

SIS User Manual

***Screening Information System
Version 2.1***

TABLE OF CONTENTS

1.0	OVERVIEW	1
	SIS User Manual Overview	1
	What is SIS?	1
	What is the SIS User Manual?	1
	SIS Basics	1
	Actions in SIS.....	2
	Components of SIS.....	3
	Components of SIS.....	3
	SIS Elements	6
	SIS Impact on Prenatal Screening (PNS).....	10
	SIS Impact on Newborn Screening (NBS)	11
2.0	QUICK START GUIDE	1
	Quick Start Guide.....	1
	Logging into SIS	1
	Viewing your “Homepage”	2
	Client/Case Search	6
	Search Results Grid.....	8
3.0	SCREEN DESCRIPTIONS BY NAME	1
	Add New Entity	
	Add/Edit New Address	
	Add/Edit Telecommunications	
	Additional Test Results	
	Appointments	
	Assign CCC/Lab	
	Audit Data Entry	
	Audit Results	
	Batch Run Time Report	
	Biotinidase Confirmatory Testing Expected List	
	Case Audit Results MC (Metabolic Center)	
	Case Audit Results SCCC (Sickle Cell Counseling Center)	

Case Notes
Case Summary (NBS)
Case Summary (PNS)
Cases Referred – CF Center
Cases Referred – CF Counseling Center
Cases Referred – Metabolic Center (MC)
Cases Referred – PDC, SCCC
CCR (Confidential Case Report)
Certification
CF Annual Patient Summary
CF Annual Summary Case List
CF Carrier Counseling
CF Test Results
Change Adequacy Status for a Group of Tests
Client/Case Search
Client Profile
Code Karyotypes
Conditions for PDC Approval
Consolidate Registry
Create New User
Cystic Fibrosis Service Report
Disclosure
Enter Case Resolution – Non-Screened
Enter Case Resolution – Screened
Enter Case Resolution – Screened
Enter Confirmatory Test Results
Enter NT Screen
Enter Other Mutation Test Results
Enter PSR
Enter PSR – AM (Amniocentesis)
Enter PSR – CVS (Chorionic Villus Sampling)
Enter PSR – GC (Modified Genetic Counseling)
Enter PSR – Other/Karyotype
Enter PSR – Pregnancy Status
Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome)
Enter PSR – US (Ultrasonography)
Entity Profile
Entity Relationships
Entity Search
Entity Services
Expected Recall (NBS)
GA Calculator
GA Calculator (Continued)
Generate Audit Cases
Headline Cases (NBS)
Headline Cases (PNS)
HIPAA Information
Lab C of C (Confirmation of Contact)
License
Link Accession Numbers
Link Client to Entity

- Link NBS Accession Numbers
- Link PNS Cases
- Maintain Business Rules
- Maintain CEUs
- Maintain Client Relationships
- Maintain Mailer Text
- Maintain NT Sites
- Maintain NBS Interpretation Parameters
- Maintain PNS Interpretation Parameters
- Maintain Proficiency Test
- Maintain Reference Tables
- Maintain Relationships
- Maintain Valid PNS Form Number Range
- MC Annual Patient Summary
- MC Annual Patient Summary Case List
- MC (Metabolic Center) Reporting
- MC Reference Lab Expected List
- Merge Entities
- Metabolic Services Reporting Form
- Modify Adequacy Status (NBS)
- Modify Adequacy Status (PNS)
- MS/MS Test Results
- NBS MR (Missing Result)
- NBS NO (Specimen Not Obtained)
- NBS OH (Out of Hospital)
- NBS TR (Test Refused)
- Outcome Survey
- Page Security
- PNS Interpretation Grid
- PNS Mailer Grid
- PSR Inconsistencies
- PSR Status
- Quarterly Report – Patients
- Quarterly Report – Specimens
- Reassign CCC
- Reassign CF Center
- Reassign Metabolic Center
- Remittance ID Status
- Resend Mailers
- Resolve Duplicates
- Resolve Potential Matches from TRF
- Review Coordinator Assignment
- Schedule Site Visit
- Search For Mailers
- Search for NT Data
- Search for Tests
- Search HIPAA
- Search NBS Form
- Search Quarterly Report
- Search Relationships
- Security Groups

Select Entity Type
Services History
Services Rendered
Set Case Alerts
Set Case Alerts (Continued)
Set Case Alerts (Continued)
SIS Sign-In
Special Payment Authorization
Specimen History
Supply Search
Tracking Events
TRF Data Entry (NBS)
1ST T TRF Data Entry (PNS)
2nd TRF Data Entry (PNS)
Unlink Specimens
Update Address
Update Case (NBS)
Update MSMS Review Cases
Update Name
Update Phone Numbers
Update Telephone Area Code
Upload CCR (Confidential Case Report)
Upload CFF File
Upload FMF NT Practitioners
Upload NT Practitioner Medians
Upload Outcome Survey
Upload Quarterly Report
View Address
View Alerts
View All Users
View CFF File Records
View Client Profile
View Edit Log
View Holding Tank Records
View List of CCRs (Confidential Case Reports)
View MC Reference Lab Expected List
View MSMS Review Cases
View Reference Tables
View Security Groups
View Special Service Authorization

4.0 GLOSSARY2

1.0 Overview

SIS User Manual Overview

What is SIS?

SIS is a fully integrated clinical screening system that supports California's Newborn and Prenatal Screening Programs. In 2005, SIS replaced the aging Data General systems to enable the Genetic Disease Screening Program (GDSP) to fully support the State's annual 525,000+ newborn and 360,000+ prenatal screening tests. The system allows users to capture, store, analyze, and review patient test samples and demographic data, and initiate and manage the subsequent processing, tracking, follow-up, billing, and reporting activities associated with case management. SIS is used by a wide variety of users including Newborn and Prenatal Screening (NAPS) Laboratories, Case Coordination Centers (CCCs), NT Practitioners, Confirmatory Laboratories, Prenatal Diagnostic Centers (PDCs), Sickle Cell Counseling Centers (SCCCs), Metabolic Centers (MCs), Cystic Fibrosis Centers (CFs) and GDSP users.

SIS uses hardware and software technology to provide substantial improvements over the Data General systems and to support GDSP's screening programs far into the future. The system was designed to provide a wide range of benefits, including the following:

- Improved user-friendliness.
- Increased scalability, which allows for functionality expansion when required and capability to support growth of the user population.
- Streamlined maintenance and operations activities.
- Enhanced reporting capabilities.
- Automated workflow.
- Increased access to case management data.
- Centralized information storage and access.
- Improved case and client matching.

What is the SIS User Manual?

The SIS User Manual was developed to serve as an online and desk reference guide, providing information about how to use each screen in SIS. The SIS User Manual contains detailed descriptions of all SIS screens that end-users have access to view, update, create or delete. Information from each screen is described using one or more screenshots, how to navigate to the screen, an overview of the screen and its purpose, and a description of the key functions.

SIS Basics

The SIS application is used to view, enter, update, and utilize prenatal and newborn screening information. SIS is a web-based application, allowing users to access the system from any computer with an Internet Explorer web browser (software that allows the user to view and interact with web pages). This section provides an overview of the Microsoft Internet Explorer browser, how to perform actions in SIS, and the primary components of SIS.

Actions in SIS

Most actions in SIS can be performed using both the mouse and keyboard. When both the keyboard and mouse work, the functionality will generally be the same regardless of which option you choose.

The **Tab** key will move the cursor from field to field as you enter data into SIS.

In SIS, the **Enter** key may perform different functions than in the system you used previously, Data General. Following are three functions of the **Enter** key in SIS.

- Hitting **Enter** will usually save information on the page you are currently viewing.
- On the Update Case screen, hitting **Enter** will invoke the Reinterpretation button. A reinterpretation of the patient's results will be generated. However, this information will not be saved until you select **Save**.
- If you've used your **Tab** key to tab onto one of the buttons on a page (SIS-specific buttons are described in further detail below) typing the **Enter** key will invoke the action of that button.

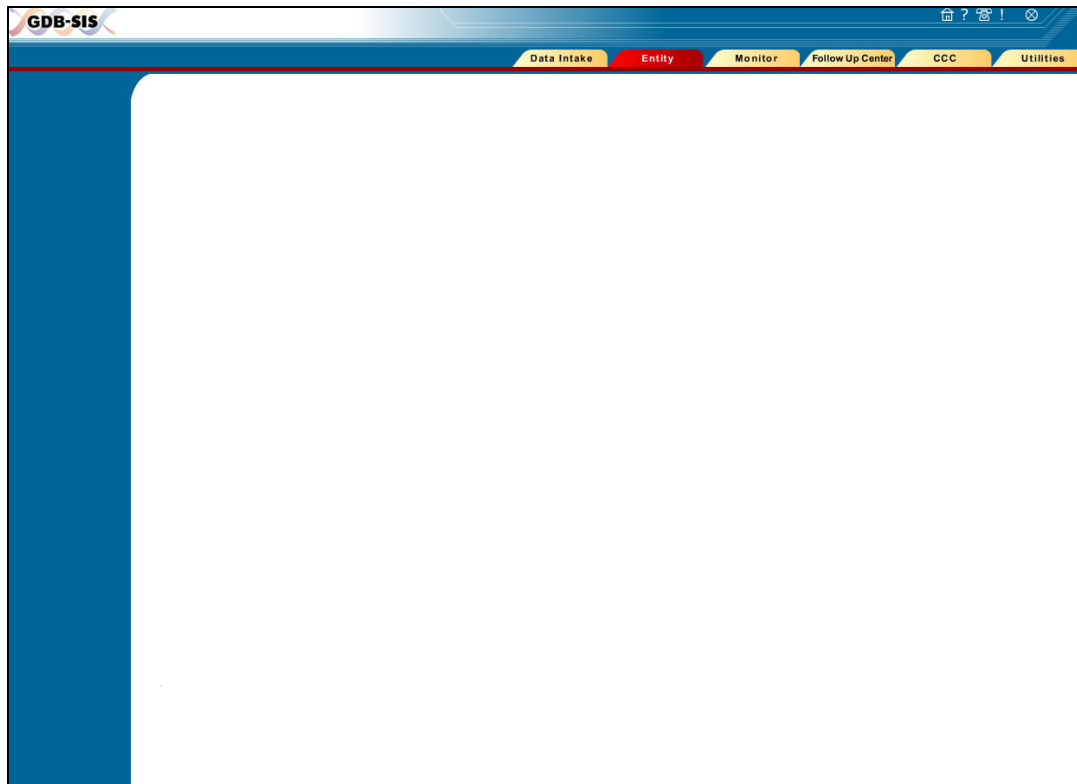
The **Up Arrow** and **Down Arrow** keys may be used to select data from a dropdown without using the mouse.

The step-by-step processes detailed in each lesson in this manual are written using the visual functionality of the SIS application, which relies on a mouse for some actions. The following terms are used for **mouse actions**, based on a mouse that is configured for the right hand.

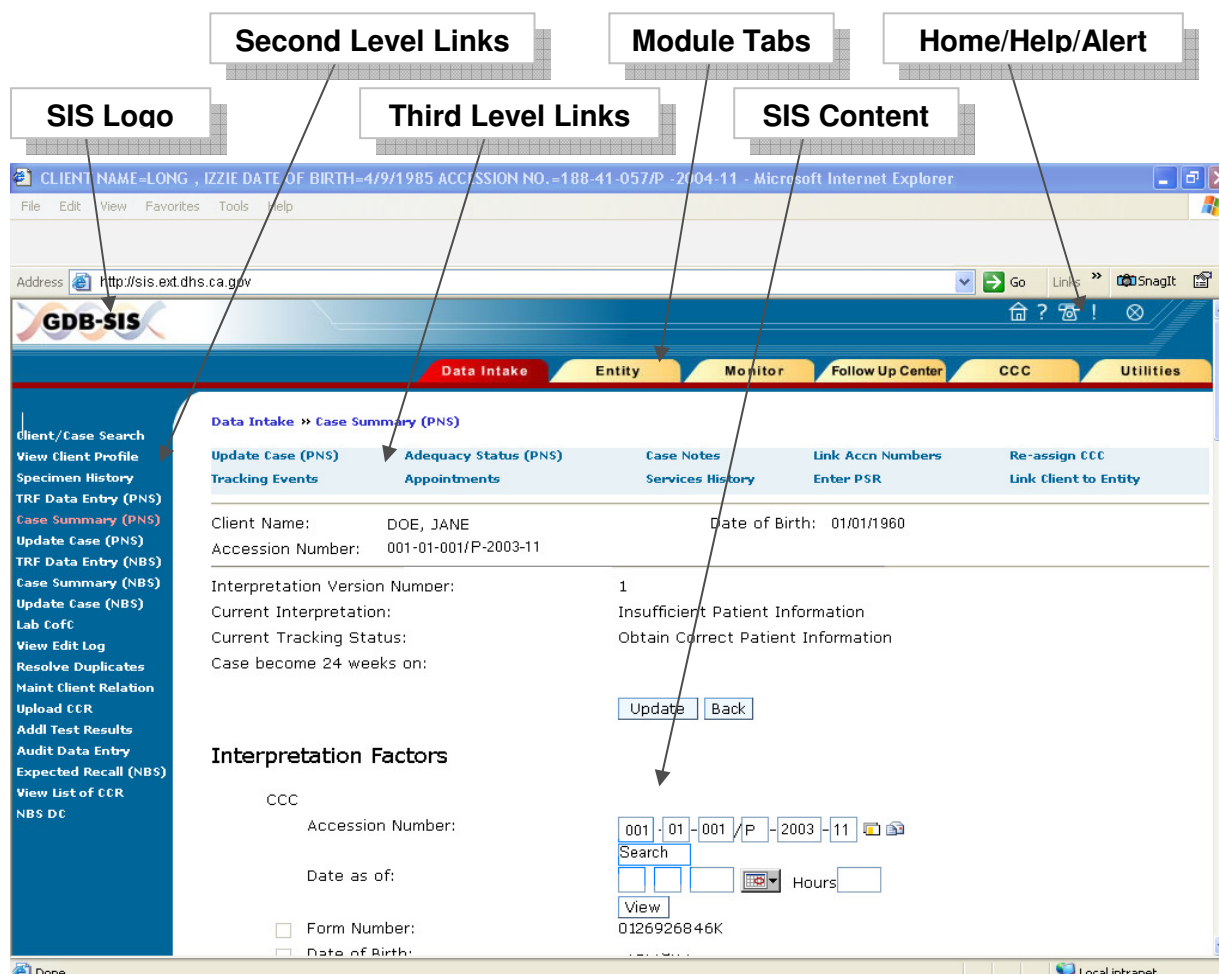
	Instruction	Description
1	Click	Press the left button on the mouse once.
2	Right-click	Press the right button on the mouse once.

Components of SIS

All SIS screens are composed of two primary areas: Navigation and Content. Navigation sections are used to locate specific functions or activities that you would like to perform. This includes tabs, icons, and links that, when clicked, load specific SIS screens. The Content section displays the information associated with the specific screen to which you navigated. This includes text, fields, buttons, and other controls used to perform actions in SIS. The Navigation and Content in SIS is separated in an upside down “L” layout. This layout will always be used so that all SIS screens have a uniform look and feel. In the figure below, which illustrates a SIS screen, the navigation is located in the gray upside down “L” while the content is located in the white square.



Within the Navigation and Content areas, SIS contains detailed screen layout components. These include module tabs, second and third level links, the SIS logo, home/help/alert navigation, and SIS content. The diagram below illustrates where each of these layout components are found in SIS.



Module Tabs (First Level Links)

Modules are groupings of screens that will help specific user groups accomplish their work. Your specific user group will determine what module tabs are available to you. For example, an individual working in a Case Coordination Center (CCC) will see modules such as Data Intake, Entity, Monitor, Follow-Up Center, CCC, and Utilities. These module tabs are the highest level of navigation available in SIS and sit across the top of the screen.

Second Level Links

Second level links are links to individual screens within a module that accomplish a specific task. Second level links sit along the left side of the screen. For example in the Data Intake Module, the user may want to view a client profile.

Third Level Links






Third level links are links to screens associated with the second level links of a module. In the previous example of viewing a client profile summary, the associated tasks you want to accomplish may include updating contact or case information or entering tracking events. Also, third level links may provide access to the same screens as second level links. Third level links sit under the module tabs on the screen.

Main Content of Page

The main content of the page is where you will view or enter data. Depending on your access rights, this may include viewing headline cases, updating case information, or maintaining a user account. The main page content sits in the center of the screen, below the third level links.

Home/Help/Contact/Alert/Sign Out

The Home/Help/Alert Navigation component of the screen will be the central location for individuals to navigate to the home page of SIS, receive help within the application, and view pertinent alerts directed to them. This component sits at the top right hand corner of the screen. The specific buttons and the associated functions are described below.




	Button	Button Name	Description
1		Home	Returns you to your default SIS homepage.
2		Help	Opens the SIS help screens. This should be used if you have questions or need assistance with SIS functionality.
3		Contact	Provides contact information for the SIS Help Desk
4		Alert	Loads the SIS Alerts screen. Alerts are notifications you may receive in SIS that require your attention and may prompt further action. Do not disregard an alert! This screen shows the various alerts for cases relevant to your user group and role in SIS.
5		Sign Out	Immediately terminates your session in SIS and logs you out of the application. Be sure to click the Save button before signing out to save your work. On some screens, there is no warning about losing unsaved data. To begin using SIS again, you must re-login to the system. It is important to sign-out when you are done using SIS so that unauthorized users will not gain access to the system.

SIS Elements

Fields

Fields are rectangular boxes on the screens in SIS that are used to enter text or information and display specific information. Most fields are labeled to indicate the type of information to be entered in the field, such as “Accession Number” or “Last Name”.



SIS fields also have various properties that influence how a user interacts with the field. The fields in SIS can have one (or more) of five common properties: modifiable, required, repeat entry, display-only, and grayed out.

	Field Type	Description
1	Modifiable	One of the most common field properties that allows users to enter or update information in the field. For example, in a modifiable field, users can click in the field and enter data, usually letters, numbers or characters. Generally, a modifiable field is a box with a white background.
	<i>Example:</i> First Name:	
2	Required	The information in these fields is required in order for a user to save a screen or perform an action. If you attempt to save a record without first entering data in the required fields, SIS will provide an error message to tell you which required fields you’ve missed. Required fields are indicated by a preceding asterisk (*) symbol.
	<i>Example:</i> * Transferase:	
3	Repeat-Entry	These fields contain data on which GDSP places emphasis by requiring the data entry user to enter the same information twice in the field. This repeat-entry is designed to prevent data entry errors. Repeat-Entry fields are indicated by a preceding pound/number (#) symbol.
	<i>Example:</i> #Date of Birth:	

	Field Type	Description						
<p>4</p> <p>Display-Only</p> <p><i>Example:</i></p> <table border="1"> <tr> <td>Client Name:</td><td>DOE, JANE</td><td>Date of Birth: 01/01/1960</td></tr> <tr> <td>Accession Number:</td><td>001-01-001/P-2003-11</td><td></td></tr> </table>	Client Name:	DOE, JANE	Date of Birth: 01/01/1960	Accession Number:	001-01-001/P-2003-11			<p>Contains data that cannot be updated on the screen where the information is displayed. In general, this information will be displayed as plain text, rather than inside a box or other field.</p>
Client Name:	DOE, JANE	Date of Birth: 01/01/1960						
Accession Number:	001-01-001/P-2003-11							
<p>5</p> <p>Grayed Out</p> <p><i>Example:</i></p> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Galactosemia</div>		<p>Contains data that cannot be entered or updated on the screen where the information is displayed. Grayed out data is displayed inside a box, similar to the modifiable field; however, you will not have access to modify grayed out fields.</p>						
<p>6</p> <p>Check box</p> <p><i>Example:</i></p> <p>Race / Ethnicity: <input type="checkbox"/> White</p>		<p>A checked box indicates “yes” or that the data applies. An unchecked box indicates that the data does not apply or has not yet been identified.</p>						
<p>7</p> <p>Drop-down</p> <p><i>Example:</i></p>		<p>Lists the possible values for the field.</p> <p>You cannot type free form text into a drop-down field. Rather, you must click on the down arrow on the right side of the box to view the list of possible values.</p> <p>To get to a value quickly, type the first letter of the value; the drop-down field will take you directly to the values starting with that letter. Alternatively, you can scroll down to find the value you are looking for.</p> <p>*Gender: Select ▼</p>						
<p>8</p> <p>Radio button</p>		<p>Indicates a choice. Radio buttons are usually used to display a group of options, when you can only choose one at a time.</p>						

Field Type Description

Example:

Select	Entity Type	Entity Name
	Case Coordination Center (CCC)	GENETIC DISEASE BRANCH - PNS
	Government Agency	GDB

9 Data Grid


Used to display a grouping of related data in a table format in SIS. Similar to a table, a data grid has rows, columns, and column headers. Depending on the data grid's length, some may have scroll bars so that users can view additional information by scrolling up or down.

Example:

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status
001-01-001/P-2003-11	DOE	JANE	01-01-1960			No Show
001-01-001/P-2003-11	DOE	KAREN	01-01-1960			Not Scheduled

Data Types

Certain fields may require specific types of data, other than alpha characters, to be entered. The table below describes the most common data types in SIS.

Data Type	Description
1 Numeric	May contain numbers only.
2 Date	May contain dates only. Often has a calendar icon () that can be used to quickly select a date.
3 Time	May contain times only. Times should always be recorded based on a 24-hour military clock. For example, 4:00pm should be entered as "1600".

SIS–Specific Actions

Buttons


Throughout SIS, buttons are used to perform certain actions, such as saving data or updating data. The table below lists the buttons that are displayed on screens in SIS that are common to all user groups. These buttons generally perform the same function on any screen where they are found. Buttons that relate to specific job functions or user groups are described in the subsequent chapters, where they will be used.

	Button Name	Description
1	Save	Saves data that you have entered into SIS.
2	Update	Takes you to an edit screen, to allow you to update data that was previously entered.
3	Back	Returns you to the previously displayed screen.
4	Sort	Sorts the displayed data based on your selected sort criteria.
5	Clear	Clears the data fields on the displayed screen.
6	Edit	Allows you to enter Edit mode on the same screen, in order to change data that was previously entered.
7	Search	Searches data in SIS for items matching your selected search criteria.

Accession Number Icons

On any screen where you can input an Accession Number, there are two icons located directly to the right of the field. These icons will make it very easy for you to copy an Accession Number onto another screen to search for that same client. You simply click

on the copy icon: 

When you get to search screen, you click on the paste icon:  and the Accession Number you have copied will be displayed in the Accession Number field.

SIS Impact on Prenatal Screening (PNS)

The Expanded Alpha-Fetoprotein Program (XAFP) will be referred to as the Prenatal Screening (PNS) Program going forward. In most cases, wherever you would reference the XAFP program, GDSP will use the term PNS program throughout this User Manual, and as a business practice going forward.

In addition, with the SIS application there are a few instances in which PNS business practices will change. Following is a description of these changes.

New Forms

The following descriptions highlight important changes to the Test Request Form (TRF) and the Result mailer.

Test Request Form: TRFs will now be entered into SIS using Optical Character Recognition (OCR) technology. However, Newborn and Prenatal Screening Laboratories will have the ability to enter TRF data directly into SIS as well.

Result Mailers:

1. Result mailers have a new format.
2. For non-negative cases, users must actively generate a Result mailer for same-day processing, bypassing the automatic 3-day hold for non-negative mailers.

New Functions

SIS will also provide several additional functions for the PNS program. These include:

Tracking Events: Several new tracking events will be available to you in SIS.

Case Notes: You will have the ability to track notes about a case online using SIS. The notes will be stored in SIS and you will have access to refer to them anytime.

New Headline Cases: You will now receive a Headline Case in SIS for two additional types of cases:

1. Coordinator actions required on Screen Negative cases
 - These will include screen negative cases with twins or marked “Yes” for HX/RX.
2. Prompt for Coordinator to review the TRF image
 - SIS will allow the coordinators to view the scanned image of any TRF. However, the data entry clerks can also flag a TRF for coordinator review. Such a case will appear on the Headline Case screen with a checkmark in the “View Form” column. This is true even if the test results are screen negative.

PDC Access to Modify Interpretation Factors: One change for PNS operations using SIS will be that Prenatal Diagnosis Centers (PDCs) will have access to view case information, schedule appointments, modify interpretation factors and send those changes to you for review and approval.

SIS Impact on Newborn Screening (NBS)

With the SIS application, there are a few instances in which NBS business practices will change. Following is a description of these changes.

New Forms

The following descriptions highlight important changes to the Test Request Form (TRF), the Result mailer, NBS Diagnosed Case form and the NBS Special Forms.

Test Request Form:

1. Additional information has been added to the Test Request Form (TRF).
2. TRFs will now be entered into SIS using Optical Character Recognition (OCR) technology. However, Newborn and Prenatal Screening Laboratories will have the ability to enter TRF data directly into SIS as well.
3. In addition, the format of the TRF has changed; it will no longer be attached to the filter paper.

Result Mailers:

1. Additional information has been added to the Result mailer, and it has a new format.
2. Users now have the option to generate a Result mailer for same-day delivery, bypassing the automatic 3-day hold. This will only happen if the mailer is complete and ready to go.

NBS Diagnosed Case Form:

1. This form will now be completed online by the Case Coordinator.
2. Both the format and content of this form have changed.
3. In addition, Case Coordinators will now enter this information into SIS as part of the case resolution, rather than sending a paper form to GDB after the case has been resolved.

NBS Special Forms:

The NBS OH, TR, MR and NO forms will now be entered into SIS by the NBS Monitor using OCR technology. If a form requires follow up, the Coordinator will receive a Headline Case, and will be able to update the form online.

New Functions

In addition to the changes mentioned above, SIS will provide Case Coordinators with access to more functions than you have had in the past. Following are descriptions of these new functions.

Tracking Events: This is a function in SIS that will help the user to track actions related to a case. For example, "Clinician notified of inadequate specimen" is a tracking event; entering this tracking event will add a note to the case history.

Case Notes: Users will have the ability to track notes about a case online using SIS. The notes will be stored in SIS and you will have access to refer to them anytime.

Updating a Client or Case: Case Coordinators will have access to modify patient and/or case data in SIS.

Transferring Cases: Case Coordinators will have access to transfer a case to another Case Coordination Center (CCC) in SIS.

New Headline Cases: Case Coordinators may receive four new types of Headline Cases: 1) Transfused, 2) A only Hemoglobins, 3) MS/MS and CAH, 4) NBS Forms, 5) CF, and 6) BD.

2.0 Quick Start Guide

Quick Start Guide

This Quick Start Guide provides basic information about how to access the screens where work will normally be started. More detailed information for all of the SIS screens and how to locate records in SIS is located in the following pages

Logging into SIS

To begin using SIS, you must first log in to the system. Each SIS user has his/her own unique username and password. Users will be prompted by the system to change their passwords every 60 days.

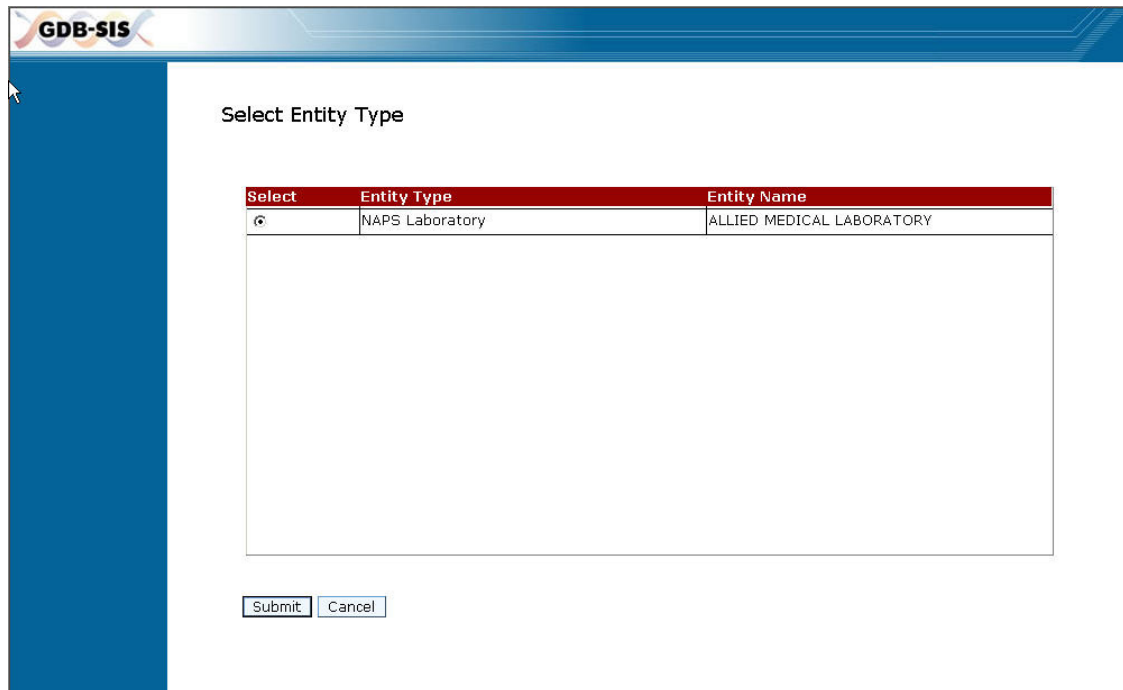
The first screen you will see after entering the SIS URL (<http://sis.ext.dhs.ca.gov>) is the Login Screen – see below. To log in, enter your username in the “User Sign in ID” field (#1) and your password in the “Password” field (#2). Then click the “Sign In” button (#3) and SIS will validate your login information and allow you to enter the system if your data was entered correctly and you have a user account.

The screenshot shows the GDB-SIS Login Screen. At the top left is the GDB-SIS logo. The main area contains two input fields: "User Sign in ID:" and "Password:". Below these fields are two buttons: "Sign In" and "Clear". To the left of the input fields are two callout boxes: "#1 – Enter Username" pointing to the "User Sign in ID:" field and "#2 – Enter Password" pointing to the "Password:" field. To the right of the "Sign In" button is a callout box: "#3 – Click 'Sign In'" pointing to the button. Below the input fields is a line of text: "For technical assistance on GDB-SIS please [click here](#)". To the right of this text is a callout box: "#4 – Click here if you have problems signing in." pointing to the [click here](#) link. In the bottom left corner, there is a VeriSign Secure Site logo with the text "Click to verify".

If you experience problems logging in, first verify that you are typing your login information correctly. If you are still experiencing problems, click the link for technical assistance (#4).

Viewing your “Homepage”

After logging in you will see the Select Entity Type screen. Select the entity type you wish to log in as, and click **Submit** button.



The screenshot shows the 'Select Entity Type' screen of the GDB-SIS application. The interface has a blue header bar with the 'GDB-SIS' logo on the left. A blue sidebar is visible on the left side of the main content area. The main content area is white and contains the title 'Select Entity Type' at the top. Below the title is a table with three columns: 'Select', 'Entity Type', and 'Entity Name'. The first row of the table has a radio button in the 'Select' column, 'NAPS Laboratory' in the 'Entity Type' column, and 'ALLIED MEDICAL LABORATORY' in the 'Entity Name' column. Below the table are two buttons: 'Submit' and 'Cancel'.

Select	Entity Type	Entity Name
<input checked="" type="radio"/>	NAPS Laboratory	ALLIED MEDICAL LABORATORY

You will be directed to a “SIS homepage” or the first screen you will see each time you login to SIS. The homepage will be different for each user type. You may be required to enter information such as Center Code and you will then be directed to the screen at which you will normally start your work. Following are descriptions of each homepage.

The following screens are the most common starting points. For more detailed descriptions of these screens refer to the User Manual.

CCC: Headline Cases.

Allows you to view all Headline Cases assigned to your CCC. Click the **Download New Cases** button to view new cases.

3379:ccc001
01/27/2005
09:31:06.940

Status	View Form	Date Assigned	Last Name	First Name	Accession No	Interpretation	Tracking Status	Last Name of Provider	First Name of Provider	Facility
OPEN	<input type="checkbox"/>	06/25/2003	DOE	JANE	091-25-019/P - 2003-11	Partial, Screen Positive; increased risk T21	Arrange Immediate Referral	SMITH	JOHN	
OPEN	<input type="checkbox"/>	01/01/2003	DOE	JUDY	001-93-031/P - 2003-12	Partial, Screen Positive; increased risk for NTD	PDC referral to site	SMITH	JOE	

Follow-Up (PDC, SCCC, MC): Cases Referred

Allows you to view your referred cases. You must enter your **Center Code** and click the **Go** button.

Follow Up Center >> Cases Referred

*Center Type: Prenatal Diagnosis Center (PDC)
 *Center Code: 75e Search
 Center Name: Kaiser-San Francisco
 Go Clear Back

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	24 w Gest
001-75-211/P - 2003-22	DOE	JANE	01-01-1980	01-04-2004	1000	Kept	11-10-2004	40	
001-93-019/P - 2003-12	DOE	MARY	01-02-1980	11-17-2003	0800	Scheduled	01-05-2005	40	02-14
002-24-101/P - 2003-11	DOE	JUDY	01-03-1980			Not Scheduled	01-10-2005	40	02-22
026-16-129/P - 2003-32	DOE	KATHY	01-04-1980			Not Scheduled	01-13-2005	40	03-20

Monitor (PNS, NBS, PSQA, PDES): View Alerts

Allows you to view your Alerts. You may enter filter criteria and then click the **Search** button or click the **Search** button with no filter criteria to see a complete list.

Monitor » View Alerts

User: 4092
 Center Code: 40
 Filter by: All Search
 Primary Sort: Select
 Secondary Sort: Select
 Alert Text:
 Alert Status: Select
 Save Cancel

Select	Alert Status	Cancel Alert	Alert Code	Description	Client Name	Unique Identifier	Center Code	Date	Time
<input type="radio"/>	Open	<input type="checkbox"/>	15	Inconsistencies related to PSR	DOE, JANE	012-25-037/P - 2003-32	40	01/17/2003	00:00:00
<input type="radio"/>	New	<input type="checkbox"/>	15	Inconsistencies related to PSR	DOE, JANE	012-05-034/P - 2003-22	40	01/17/2003	00:00:00
<input type="radio"/>	New	<input type="checkbox"/>	93	New NTD registry case from a PSR	DOE, JANE	034-05-012/P - 2003-32	40	01/17/2003	00:00:00

Laboratories (NAPS, GDL, Confirmatory): Client/Case Search

Allows you to search for a client or case record. Enter your search criteria and then click the **Search** button.

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search

View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Data Intake » Client/Case Search

Accession Number 013-98-120/P-2003-11

Accession Range 0

Form Number

Form Range 0

Patient's Last Name

Patient's First Name

Birth Date

Date Range 0

Social Security Number

Collection Date

Collection Range 0

Hospital Code

Medical Record Number

Part of Registry Select

SCCC Service Code Number

Search Options:

☐ Partial Name ☐ Phonetic Spelling

☐ Other Name

Search Reset New

Search Results

Select	Name	Birth Date	Social Security Number	Accession Number	Collection Date	Baby Birth Date	Baby Last Name	Baby Accession Number
<input checked="" type="radio"/>	DOE, JANE	01/01/1980	123-45-6789	013-98-120/P-2003-11	01/10/2003			

Return Selected

Client/Case Search

The Client Case Search screen is used to locate existing client or case information in SIS. You may search using the Accession Number or Form Number alone, or by entering at least two other search criteria together.

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search

View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab tofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Data Intake » Client/Case Search

Accession Number
Accession Range
Form Number
Form Range
Patient's Last Name
Patient's First Name
Birth Date
Date Range
Social Security Number
Collection Date
Collection Range
Hospital Code
Medical Record Number
Part of Registry
SCCC Service Code Number

Search Options:
☒ Partial Name
☐ Phonetic Spelling
☐ Other Name

1. **Accession Number or Form Number** can be used individually as search criteria.
 - a. **Accession Range** allows you to specify a range of sequence numbers to return in the search. For example, if “5” is selected, the search will only return accession numbers with a sequence number 5 above, and 5 below your specified accession number.
 - b. **Form Range** allows you to specify a range of form numbers to return in the search. For example, if “5” is selected, the search will only return forms with a form number 5 above, and 5 below your specified form number.
2. If neither the Accession Number nor Form Number is available, at least two of the remaining fields must be used together in order to search.

Client/Case Search (continued)

GDB-SIS

Date Intake
Entity
Monitor
Follow Up Center
CCC
Utilities

Client/Case Search

View Client Profile

Specimen History

TRF Data Entry (PNS)

Case Summary (PNS)

Update Case (PNS)

TRF Data Entry (NBS)

Case Summary (NBS)

Update Case (NBS)

Lab CoC

View Edit Log

Resolve Duplicates

Maint Client Relation

Upload CCR

Add Test Results

Audit Data Entry

Expected Recall (NBS)

View List of CCR

NBS DC

Data Intake » Client/Case Search

Accession Number	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>
Accession Range	<input type="text" value="0"/>
Form Number	<input type="text" value=""/>
Form Range	<input type="text" value="0"/>
Patient's Last Name	<input type="text" value="allis"/>
Patient's First Name	<input type="text" value="rosi"/>
Birth Date	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>
Date Range	<input type="text" value="0"/>
Social Security Number	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>
Collection Date	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>
Collection Range	<input type="text" value="0"/>
Hospital Code	<input type="text" value=""/>
Medical Record Number	<input type="text" value=""/>
Part of Registry	<input type="text" value="Select"/>
SCCC Service Code Number	<input type="text" value=""/>

Search Options:

☒ Partial Name
 ☒ Phonetic Spelling

☐ Other Name

3. **Search Options** allows you to specify the type of search you wish to perform.
 - a. **Partial Name** allows you to enter part of a name, and return all matching records.
 - b. **Phonetic Spelling** allows you to enter the phonetic spelling of a name, and return all matching records.
 - c. **Other Name** allows your search to include both “aliases” and primary name, and return all matching records. An Alias can be entered for a client through the Update Name 3rd level link on the Client Profile screen which allows you to enter additional names for a client.

Search Results Grid

Part of Registry: Select

SCCC Service Code Number:

Search Options:

☐ Partial Name ☐ Phonetic Spelling

☐ Other Name

4 Search **Reset** **New**

5 Search Results

Select	Name	Birth Date	Social Security Number	Accession Number	Collection Date	Baby Birth Date	Baby Last Name	Baby Accession Number
<input type="radio"/>	DOE, JANE	01/01/1980	123-45-6789	6 013-98-120/P -2003-11 7	01/10/2003			

8 Return Selected

4. Buttons:

- Search** button will initiate a search based on the search criteria you have entered.
 - Reset** button, when used before you click the Search button, will clear all information from all fields. When used after you have clicked the Search button, the Reset button will clear all search criteria fields, as well as any search results in the Search Results grid.
 - New** button will direct you to the Client Profile screen, and allow you to create a new client.
- Search Results** grid will display all records that match your search criteria. For PDC, MC, and SCCC users only, the Search Results will only display data related to your job function. For example, PDC users will only be able to view cases that have been referred to their PDC. If the search returns more than 50 results, a warning will display, requiring you to refine your search criteria.
 - Clicking the **Name** link will direct you to the View Client Profile Screen.
 - Clicking the **Accession Number** link will direct you to the Case Summary screen.
 - If you have been directed from another screen to the Client / Case Search screen, click the radio button next to the record you want to view, and click the **Return Selected** button. You will be redirected back to the screen you came from, and your selected client / case information will be displayed.

3.0 Screen Descriptions by Name

Add New Entity

Entity >> Entity Search >> Add New Entity

The **Add New Entity** screen is used to create new entity records in SIS. An example of an entity can be, but is not limited to a person, a hospital or a laboratory. There are established entity types in SIS. To add an entity you must first search for the entity on the Entity Search screen.

The fields displayed in the **Add New Entity** screen depend upon the Entity Type. For example, when adding a PDC-type entity you must identify the Organization Name in SIS. Whereas, when adding a person-type entity you must identify the person's First Name and Last Name.

Following is an example of one Entity Type screen.

FIGURE 1

1. Select an **Entity Type** to display the entity-specific fields (see **FIGURE 2**).

FIGURE 2

2. Enter the new entity's information in the fields provided. Depending on the type of entity, at least two of the following required fields will be present.

Entity Type

First Name

PDC Type

Hospital Type

Organization Name

Last Name

Program Area

Add New Entity (Continued)

FIGURE 3

3

NBS Collection Facility: <input type="checkbox"/>	NAPS Lab: Select	CCC: Select
--	---------------------	----------------

3. If the New Entity is an **NBS Collection Facility** it is important that you check this box and select the associated NAPS Laboratory and/or CCC from the dropdown.

FIGURE 4

4

License Type: Select	License Number: 	License Status: Select
-------------------------	---------------------	---------------------------

4. You can enter the license information for the entity on this screen. The **License Number** field has specific format requirements. For information about the format requirements for License Number entries, refer to Appendix G – License Number Format Structure.

Note: You can add license information in the Add New Entity screen; however you must use the License screen to update any license information that has been saved.

FIGURE 5

5

* PDC Type: Select	
Clinic Schedule: 	
Provides CVS: <input type="checkbox"/>	
Federal Tax ID: 	
NPI Number: 	

5. As part of PE-II, “Provides CVS” field is added for the entity type PDC to identify whether PDC will provide CVS services.

FIGURE 6

6

7

Degree: <input type="checkbox"/> MD <input type="checkbox"/> DO <input type="checkbox"/> MS <input type="checkbox"/> MPH <input type="checkbox"/> MSW	Mailing List Type: <input type="checkbox"/> PKU Registry Auxiliary <input type="checkbox"/> MPKU Auxiliary <input type="checkbox"/> Cytogenetic Contacts Auxiliary <input type="checkbox"/> NBS Auxiliary <input type="checkbox"/> Sickle Cell Auxiliary	Notes:
Medi-Cal Offset Number: NBS Collection Facility: <input type="checkbox"/>	Payer Fallback Rule: Select	Federal Tax ID:
Entity Status: Active	NAPS Lab: Select	CCC: Select
	Effective Start Date: 12-12-2008	Effective End Date:
Save Clear Cancel		

Add New Entity (Continued)

6. The **Entity Status** field is automatically set to “Active” and the **Effective Date** field is automatically set to the current date
7. **Buttons:**
 - a. Click the **Save** button to save the new entity information you entered.
 - b. Click the **Clear** button to clear the contents of the fields discarding any changes you made.
 - c. Click the **Cancel** button to return to the Entity Type selection described in **FIGURE 1**

Add/Edit New Address

Entity >> Entity Profile >> Add/Edit New Address

The **Add/Edit New Address** screen is used to create a new address record or update an existing address record for an entity in SIS.

FIGURE 1

1. Displays information about the entity that is currently selected.
2. The user can update address information for selected entity.
3. **Program Area** and **Contact Type** are required fields. For Contact Type, select the type of address you wish to edit (i.e. Physical Location, Billing Address, etc.).
4. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature you should verify any corrections SIS makes to the address you have entered.
5. **Do not validate address** – Checking the box will deactivate the address validation feature. **Kaiser Affiliation** is a required field.

Add/Edit New Address (continued)

FIGURE 2

The screenshot displays a web form titled "Add/Edit New Address". It is divided into two main sections: "Telecom Information" and "Shipping Details".

Telecom Information Section:

- 6** points to the "Telecom Type" dropdown menu, which currently shows "Select".
- 7** points to the "Add/Edit Telecom Information" link.
- The "Telecom Number/Email" field is present but empty.
- The "Status" dropdown is set to "Active".
- The "Effective Start Date" and "Effective End Date" fields are present with calendar icons.

Shipping Details Section:

- 8** points to the "Supplies Purchase Order Number" field.
- 9** points to the "Services Purchase Order Number" field.
- 10** points to the "Save" button at the bottom of the form.
- The "* Address Status" dropdown is set to "Active".
- The "Effective Start Date" is set to 06-30-2008.
- The "Effective End Date" field is empty.

At the bottom of the form, there are three buttons: "Save", "Clear", and "Cancel".

6. Select a **Telecom Type** and enter the telecommunication (i.e. phone, fax, or email) information for the entity. Once you have selected a Telecom Type, the **Telecom Number/Email** fields will be displayed and can be updated on this screen.

Note: When creating a new address five empty telecom type boxes will be available on this screen. When updating an existing address only the existing telecom types will be available on this screen. In this case, use the Add/Edit Telecom Information link to create new telecom records for the entity.

7. You may also click the **Add/Edit Telecom Information** link to edit existing telecom information or create new telecom entries.
8. **Shipping Details.** Enter any shipping information that pertains to the address you have entered.
9. **Address Status** is a required field. If you select "Effective Date Status" from the dropdown you can enter an effective date on which the address will become Active.
10. **Buttons:**
 - a. Click the **Save** button to save the address and telecom information that you have entered.
 - b. Click the **Clear** button to clear all fields and discard any unsaved address and telecom information.
 - c. Click the **Cancel** button to return to the View Address screen and discard any unsaved address and telecom information

Add/Edit Telecommunications

Entity >> Entity Profile >> Add/Edit Telecom

This screen enables users to add new or edit existing telephone numbers, fax numbers and email addresses for an entity. You can access this screen by clicking on the Add/Edit Telecom Information link on the Add/Edit New Address screen.

FIGURE 1

Entity >> Entity Profile >> Add/Edit Telecom

View Address Entity Relation Maintain CEU's License Certification
 Entity Services Merge Entities Cond for PDC Approval

Entity ID: 153 Entity Code: 39q
 Entity Name: Anaheim Memorial Hospital

Telecom Information

Telecom Type	Telecom Number/Email	Status	Effective Date
Select		Active	01-18-2003

	Telecom Type	Telecom Number	Telecom Status	Effective Date	Updated Date	Updated By
<input type="radio"/>	Office Phone Number	(510)-420-1111 X	Approved	1/1/2003	1/18/2003	msc

Edit Save Cancel

- Entity information will be displayed in a read-only format based on the entity profile.
- Telecom Information** grid allows you to add a new telecom entry by selecting a value for Telecom Type and entering a phone number or email address in the Telecom Number/Email, Status and Effective Date fields. If you select an existing telecom record in the grid below it will become available for editing in this grid.
- Select one of the existing telecom records in the Telecom Information grid using the radio button and click the **Edit** button to change it. The selected telecom record will become available for editing in the telecom information grid.
- Buttons:**
 - Click the **Edit** button to edit existing telecom information after selecting the desired record from the grid using the radio button.
 - Click the **Save** button to save the new or updated telecom record.

Click the **Cancel** button to return to the Add/Edit New Address screen discarding any unsaved changes.

Additional Test Results

Data Intake >> Addl Test Results

This screen will allow a confirmatory laboratory to enter confirmatory test results for PKU, Hypothyroidism, Galactosemia, and Hemoglobin disorders. Additionally, it will allow the user to capture whether a new sample has been collected for CFTR sequencing. In order to access this screen, you must already have a case loaded from your Expected Recall (NBS) list. This list is accessed using the Expected Recall (NBS) 2nd level link from side of the screen.

FIGURE 1

GDB-SIS

Data Intake >> Addl Test Results

Client Name: DOE, JANE Date of Birth: 01/01/2003
 Accession Number: 189-65-151/21-2004-21

Additional Test Result For PKU/TSH

*Type: Phenylketonuria
 *Recall Acc #:
 Draw Station: Select
 Date Collected:

Test Result History

Select	Collected Date	Test Type	Recall Accn Num
C	01/18/2003	Phenylketonuria	001-78-151/31-2003-31

1. Client information is displayed in a read-only format based on the client profile.
2. The **Type** of test is a required field (Phenylketonuria) and is pre-filled based on the Expected Recall (NBS) screen.
3. The **Recall Acc #** is a required field.
4. Additional Test Results information. **Draw Station** and **Date Collected** may be entered.
5. **Test Result History** grid displays new entries, and entries for recall test results entered in the past, if any. A new row will be added to this grid after you save additional test results.

Additional Test Results (continued)

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Data Intake » Add Test Results

Client Name: DOE, JANE Date of Birth: 01/01/2003
Accession Number: 189-65-151/21-2004-21

Additional Test Result For PKU/TSH

* Type: Phenylketonuria
* Recall Acc #: []-[]-[]/[]-[]-[]
Draw Station: Select
Date Collected: []-[]-[]

Test Result History

Select:	Collected Date	Test Type	Recall Accn Num
<input type="radio"/>	01/18/2003	Phenylketonuria	001-78-151/31-2003-31

6 Update Delete Save Cancel

6. **Buttons:** Click the radio button next to an entry in the Test Result History grid to **Update** or **Delete** existing results.
 - a. Click the **Save** button to save the test results you have entered or changed.
 - b. Click the **Cancel** button to cancel the current Add or Update action and bring the page to view mode, where only the test result history grid is displayed.

Additional Test Results (continued)

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Add Test Results

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Client Name: DOE, JANE Date of Birth: 07/01/2004
Accession Number: 195-53-252/21-2004-11

Additional Test Result For Galactosemia

*Type: Galactosemia
*Recall Acc #:
Draw Station:
Date Collected:
Date Received:
Date Reported:
Client Type:
*Transferase:
Electrophoresis:
Genotype:

Test Result History

Update Delete Save Cancel

7. Client information is displayed in a read-only format based on the client profile.
8. The Type of test is a required field (Galactosemia) and is pre-filled to match the Expected Recall (NBS) grid entry. Only one test may be entered at a time.
9. The Recall Acc # is a required field.
10. Additional Test Results information. **Client Type** may be: New Born, Mother, or Father.
11. Transferase is a required field.
12. Test Result History – See **FIGURE 1**.
13. **Buttons** – See **FIGURE 2**.

Additional Test Results (continued)

FIGURE 4

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Add Test Results

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Client Name: DOE, JANE
Accession Number: 195-53-252/21-2004-11
Date of Birth: 07/01/2004

Additional Test Result For Hemoglobin

*Type: Hemoglobin
*Recall Acc #:
Draw Station: Select
Date Collected:
RBC:
Hgb:
MCV:
RDW:
FEP:
*TLIF Pattern:
TLIF Comment:
x 10⁶ mm³
gm / dL
FL
µg/dL RBC

Test Result History

Update Delete Save Cancel

14. Client information is displayed in a read-only format based on the client profile.

15. **Type** of test is a required field (Hemoglobin) and is pre-filled to match the Expected Recall (NBS) grid entry. Only one test may be entered at a time.

16. **Recall Acc #** is a required field.

17. **Additional** Test Results information.

18. **TLIF Pattern** is a required field.

19. **Test Result History** – See **FIGURE 1**.

20. **Buttons** – See **Figure 2**.

Appointments

Follow Up Center >> Cases Referred >> Appointments

The **Appointments** screen will allow you to view Case Appointment History information for a client at a specific Prenatal Diagnosis Center (PDC), Sickle Cell Counseling Center (SCCC), or Metabolic Center (MC). In addition, you can schedule appointments or update the status of appointments from this screen.

Before scheduling an appointment, a case must first be referred to you in SIS by the Case Coordinator. If you attempt to schedule an appointment for a case not in your Cases Referred list, you will receive a SIS error message and will not be able to schedule the appointment.

FIGURE 1 describes the **Appointments** screen for PDCs and SCCCs (On the SCCC screen gestation age is blank). The Metabolic Center Appointments screen is very similar but contains two additional fields, described in **FIGURE 4**, and does not display gestation age.

FIGURE 1

The screenshot shows the GDB-SIS interface. The top navigation bar includes 'Data Intake', 'Monitor', and 'Follow Up Center'. The left sidebar has 'Client/Case Search', 'View Client Profile', and 'Case Summary (PNS)'. The main content area is titled 'Data Intake >> Case Summary (PNS) >> Appointments'. It features a sub-navigation bar with 'Appointments', 'Services History', 'Enter PSR', and 'GA Calculator'. The 'Appointments' section displays client information: Client Name: ZYWOT, MARYANN; Accession Number: 259-66-139/A -2008-63; Date of Birth: 12/7/1985. Below this, appointment details are shown: Follow-up Center Code: 05a; Date Referred: 09-17-2008; Date Services Authorized To: 10-08-2008; *Appointment Date: 09-20-2008; *Appointment Time: 1023; Comments: (empty field); *Status: Kept. There are 'Update' and 'Back' buttons. At the bottom, a 'Case Appointment History' table is displayed.

ID	Date	Time	Appointment Type	FollowUp Code	Status	Comments	2nd Svc Auth
200457564	09-20-2008	1023	Prenatal Diagnosis Center (PDC)	05a	Kept		

Appointments (continued)

The screenshot shows the 'Appointments' screen in the GDB-SIS system. The interface includes a top navigation bar with 'Data Intake', 'Monitor', and 'Follow Up Center' tabs. A left sidebar contains 'Client/Case Search', 'View Client Profile', and 'Case Summary (PNS)'. The main content area has a breadcrumb trail: 'Data Intake » Case Summary (PNS) » Appointments'. Below this are tabs for 'Appointments', 'Services History', 'Enter PSR', and 'GA Calculator'. The 'Appointments' tab is active, displaying client information: 'Client Name: ZYWOT, MARYANN', 'Accession Number: 259-66-139/A ~2008-63', and 'Date of Birth: 12/7/1985'. Further down, it shows 'Follow-up Center Code: 05a', 'Date Referred: 09-17-2008', and 'Date Services Authorized To: 10-08-2008'. The '*Appointment Date' field is set to 09-20-2008 with a calendar icon. The '*Appointment Time' is 1023. There is a 'Comments' text area and a '*Status' dropdown menu currently set to 'Kept'. At the bottom are 'Update' and 'Back' buttons. Numbered callouts 1 through 6 point to specific elements: 1 points to the breadcrumb trail, 2 points to the client name, 3 points to the follow-up center code, 4 points to the date referred, 5 points to the appointment date field, and 6 points to the appointment time field.

1. Navigation and screen name.
2. The Client information is displayed in a read-only format based on the client profile information.
3. **Follow-Up Center Code** and the **Date Referred** (date the client was referred to your center) are displayed in a read-only format.
4. For a PDC the **"Date Services Authorized To"** is also displayed in a read-only format, based on the Case Summary information.). It is 14 weeks 6 days or 24 weeks 0 day. Once a 1st T. Referral reaches 15 weeks 0 days, the date field is calculated for GA of 24 weeks 0 days, unless the appointment has been "kept" or the case has been closed with another closing Tracking Event. If a PDC attempts to schedule an appointment for a patient who is beyond 24 weeks gestation, a warning will be displayed: "Gestational age is over 24 weeks. Special authorization required."
5. Enter the **Appointment Date** in the Appointment Date field (mm-dd-yyyy) or use the dropdown calendar to select the date. This is a required field.
 - a. When a case has been referred, but an appointment has not been scheduled in SIS within the established time period, both the CCC and the follow-up center will receive alerts.
 - CCC Alert: "Appointment has not been scheduled. Please follow-up with physician."
 - Follow-up center Alert: "Appointment has not been scheduled. Please follow-up with coordinator."
 - b. The date of the appointment must be at least one day greater than the Accession date.
6. Enter the **Appointment Time** in 24-hour military format. This is a required field. If an appointment time is not scheduled between the hours of 0800 and 1700 a warning will be displayed: "The recommended appointment times are between 0800 and 1700. Do you wish to continue?"

Appointments (continued)

FIGURE 2

The screenshot displays the 'Appointments' form within the GDB-SIS application. The form is titled 'Data Intake >> Case Summary (PNS) >> Appointments'. It includes a sidebar with navigation links: 'Client/Case Search', 'View Client Profile', and 'Case Summary (PNS)'. The main content area shows client details for ZYWOT, MARYANN, with access number 259-66-139/A -2008-63 and date of birth 12/7/1985. Below this, there are fields for 'Follow-up Center Code' (05a), 'Date Referred' (09-17-2008), 'Date Services Authorized To' (10-08-2008), '*Appointment Date' (09-20-2008), '*Appointment Time' (1023), and 'Comments'. A '*Status' dropdown menu is set to 'Kept'. There are 'Update' and 'Back' buttons. Below the form is a 'Case Appointment History' table with columns: ID, Date, Time, Appointment Type, FollowUp Code, Status, Comments, and 2nd Srvc Auth. The table contains one entry with ID 200457564, Date 09-20-2008, Time 1023, Appointment Type Prenatal Diagnosis Center (PDC), FollowUp Code 05a, Status Kept, and empty Comments and 2nd Srvc Auth fields. Two callouts are present: a circle with the number 7 pointing to the 'Comments' field, and a circle with the number 8 pointing to the '*Status' dropdown menu.

Client/Case Search
View Client Profile
Case Summary (PNS)

Data Intake >> Case Summary (PNS) >> Appointments

Appointments **Services History** **Enter PSR** **GA Calculator**

Client Name: ZYWOT, MARYANN Date of Birth: 12/7/1985
Accession Number: 259-66-139/A -2008-63

Follow-up Center Code: 05a
Date Referred: 09-17-2008
Date Services Authorized To: 10-08-2008
*Appointment Date: 09-20-2008
*Appointment Time: 1023
Comments:
*Status: Kept

Case Appointment History

ID	Date	Time	Appointment Type	FollowUp Code	Status	Comments	2nd Srvc Auth
200457564	09-20-2008	1023	Prenatal Diagnosis Center (PDC)	05a	Kept		

- Text comments may be entered in the **Comments** field. In this field you should document the reason why a patient missed or cancelled an appointment or the reason why her appointments are on different days.
- Select the Appointment **Status** from the dropdown. This is a required field. You must update this field to reflect the current appointment status. For example, if the appointment has been given the **Status** of "Scheduled", and the patient keeps the appointment, you should update the **Status** to "Kept."

Appointments (continued)

- a. Whenever you change the appointment status, a row is added to the **Case Appointment History** grid (see # 10), and a diaried event (log of all actions in a case) is created for the case. Diaried events can be viewed from the Tracking Events screen.

Status Selections:

- a. **Scheduled** – Use this to indicate that a patient has scheduled an appointment with your follow up-center. If the status of an appointment is not changed within two days after the appointment time and date, the follow-up center will receive an alert: “Appointment time and date has passed. Please update appointment status.”
- b. **Kept** – Use this to indicate that a patient has kept an appointment. An appointment status of “Kept” cannot be entered before an appointment is scheduled. For PDCs, once you have indicated that the appointment was kept, the status of the case on the Case Summary screen will be changed to “Case Closed-Appointment Kept”. Once the case is closed for a client referred to a PDC, the PDC will have access to the **Enter PSR** screen for this case.
- c. **No Show** – Use this to indicate that a patient did not cancel nor keep an appointment. When the status of “No Show” is selected, the CCC will receive an alert: “Patient Appointment No show. Please follow up.”
- d. **Cancelled** – Use this to indicate that a patient cancelled an appointment. If a patient calls to reschedule an appointment, you should first cancel the original appointment, and then schedule the new appointment. When the status of “Cancelled” is selected, the CCC will receive an alert: “Patient Appointment Cancelled. Please follow up.”
- e. **GC Kept** – Use this to indicate that a patient has kept an appointment in 1st Trimester. An appointment status of “GC Kept” cannot be entered before an appointment is scheduled. For PDCs, once you have indicated that the appointment was GC kept, the status of the case on the Case Summary screen will be changed to “GC Appointment Kept”. Once the case is closed for a client referred to a PDC, or the case has been referred to another PDC, the first PDC will still have read only access to the appointment screen for this case.
- f. **Error Appt. Not Kept** – This is not an appointment status however this can be invoked just after an appointment was entered as “Kept” or “GC Kept” erroneously. By invoking this status the appointment status will be reverted back to “Scheduled”.

Appointments (continued)

FIGURE 3 – PDC

The screenshot displays the 'Appointments' screen in the GDB-SIS system. The interface includes a sidebar with navigation links: 'Client/Case Search', 'View Client Profile', and 'Case Summary (PNS)'. The main content area is titled 'Data Intake » Case Summary (PNS) » Appointments' and features tabs for 'Appointments', 'Services History', 'Enter PSR', and 'GA Calculator'. Client information is shown at the top: 'Client Name: ZYWOT, MARYANN' and 'Date of Birth: 12/7/1985'. Below this, appointment details are entered: 'Follow-up Center Code: 05a', 'Date Referred: 09-17-2008', 'Date Services Authorized To: 10-08-2008', '*Appointment Date: 09-20-2008', '*Appointment Time: 1023', 'Comments: None', and '*Status: Kept'. 'Update' and 'Back' buttons are located below the status dropdown. A circled number '9' is placed over the 'Update' button. At the bottom, the 'Case Appointment History' table lists the appointment details.

ID	Date	Time	Appointment Type	FollowUp Code	Status	Comments	2nd Srvc Auth
200457564	09-20-2008	1023	Prenatal Diagnosis Center (PDC)	05a	Kept		

9. Buttons:

- Click the **Update** button to save the Appointment information. Address any error messages to continue (e.g. Trying to use status "GC Appt Kept – Dx Not Scheduled" when GA is over 14 wks 6 days will result in an error message).
- Click the **Back** button to display the previous screen in SIS, discarding any unsaved additions or changes.

Assign CCC/Lab

Utilities >> Assign CCC/Lab

This screen allows you to search for Zip code ranges assigned to a CCC for PNS cases or a NAPS Laboratory, update existing assignments or add new assignments.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CC

Utilities >> Assign CCC/Lab

Search For Zip Assignments

Program: PNS

Entity Type: NAPS Laboratory

CCC/NAPS Lab Code: All

Zip Code:

Search

Zip Code Assignments

Select:	Program	Entity Type	CCC/NAPS Lab Code	Zip From	Zip To
<input checked="" type="radio"/>	PNS	NAPS Laboratory	12 - ALLIED MEDICAL LABORATORY	91618	91619

New Update Delete

15712::gdb001
12/08/2004
11:55:02.640

Assign CCC/Lab (continued)

FIGURE 2

The screenshot shows the GDB-SIS web application interface. At the top, there is a navigation bar with tabs for Data Intake, Entity, Monitor, Follow Up Center, and CCC. Below this, a left sidebar contains a list of utility links: Change Password, View All Users, Batch Run Time Rept, Assign CCC/Lab (highlighted), Maint Time Parameter, View Ref Tables, Search for Mailers, View Security Groups, Maint Business Rules, and Maint Profic Test. The main content area is titled 'Utilities >> Assign CCC/Lab'. It features a 'Search For Zip Assignments' section with input fields for Program (PNS), Entity Type (NAPS Laboratory), CCC/NAPS Lab Code (All), and Zip Code. A 'Search' button is located below these fields. Below the search section is a 'Zip Code Assignments' table. The table has columns for Select, Program, Entity Type, CCC/NAPS Lab Code, Zip From, and Zip To. One entry is visible, selected with a radio button. At the bottom of the main content area, there are 'New', 'Update', and 'Delete' buttons. A circled number '5' is placed over the 'New' button. In the bottom left corner of the sidebar, there is a timestamp: 15712::gdb001, 12/08/2004, 11:55:02.640.

Change Password
View All Users
Batch Run Time Rept
Assign CCC/Lab
Maint Time Parameter
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test

15712::gdb001
12/08/2004
11:55:02.640

Utilities >> Assign CCC/Lab

Search For Zip Assignments

Program: PNS
Entity Type: NAPS Laboratory
CCC/NAPS Lab Code: All
Zip Code:

Search

Zip Code Assignments

Select:	Program	Entity Type	CCC/NAPS Lab Code	Zip From	Zip To
<input checked="" type="radio"/>	PNS	NAPS Laboratory	12 - ALLIED MEDICAL LABORATORY	91618	91619
<input type="radio"/>					

5

New Update Delete

5. Buttons:

- New** – Click the New button to create a new zip code assignment for a CCC or NAPS Laboratory. (See **FIGURE 3**)
- Update** – Select the radio button next to an entry in the Zip Code Assignments grid, and click the Update button to change an existing assignment. (See **FIGURE 3**)
- Delete** – Select the radio button next to an entry in the grid, and click the Delete button to delete an existing assignment.

Assign CCC/Lab (continued)

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center

Utilities >> Assign CCC/Lab

Change Password
View All Users
Batch Run Time Rept
Assign CCC/Lab
Maint Time Parameter
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test

Assign Zip Code

Program: PNS

*Entity Type: NAPS Laboratory

*CCC/NAPS Lab Code: 12 - ALLIED MEDICAL LABORATORY

*Zip Code From: 91618

Zip Code To: 91619

Save Cancel Clear

6. **Assign Zip Code** fields. Add new or update existing zip code assignment information for the selected CCC or NAPS Laboratory. **Entity Type**, **CCC/NAPS Lab Code**, and **Zip Code From** are all required fields.

➤ If you enter only a **Zip Code From**, the **Zip Code To** field will be populated with the same zip code.

7. **Buttons:**

- Save** – Saves new or updated assignments.
- Cancel** – Returns you to the search function.
- Clear** – Clears all entered data fields.

Audit Data Entry

Data Intake >> Audit Data Entry

This screen allows you to locate and edit TRF data that has been entered into SIS in one of two ways: 1) scanned using Optical Character Recognition, or 2) directly entered into SIS. TRF data that has been successfully saved can be edited regardless of entry method.

GDB-SIS

[Home](#)
[Help](#)
[Log Out](#)

Data Intake
Entity
Monitor
Follow Up Center
CCC
Utili

Client/Case Search

Id Search

View Client Profile

1st TRF Data Entry (PNS)

2nd TRF Data Entry (PNS)

Case Summary (PNS)

TRF Data Entry (NBS)

Case Summary (NBS)

Lab Cofc

View Edit Log

Resolve Duplicates

Maint Client Relation

Upload CER

Add Test Results

Audit Data Entry

Biotinidase Expected List

Expected Recall (NBS)

Data Intake » Audit Data Entry

Date of Accession: - -

Accession Number: 123 - 59 - 002 / A - 2008 - 62

Entry Clerk:

I-Number:

Lab Code: Select

Program Area: PNS

Search
Clear
Delete

Select	Date of Accession	Accession Number	I-Number	Entry Clerk	Date of Entry	Updated Since Entry
<input type="checkbox"/>	05-02-2008	123-59-002/A -2008-62	F362002590A	1	08-18-2008	Yes

1. Search Criteria – Enter the search criteria to locate the TRF you would like to edit. You must correctly select PNS or NBS in the Program Area dropdown.
2. **Buttons:**
 - a. **Search** - Returns TRFs that match the criteria you have entered (Search results exclude the TRFs which have been processed into SIS after the 8:00pm cutoff. You can navigate to other pages by clicking the page numbers below the results grid.
 - b. **Clear** – Clears all entered search criteria.
 - c. **Delete** – Updates the process status to 'X' for specified accession number.
3. Accession Number grid – Click on the Accession Number link to display the TRF to make changes and save them.
 - a. After clicking the Accession Number link, the Audit Data Entry screen is displayed as an exact replica of the TRF Data Entry (PNS) or TRF Data Entry (NBS) screens. Please refer to the descriptions of these screens for additional information.
 - b. Use caution when making changes to TRF data from the Audit Data Entry screen, as these changes will replace existing TRF information in SIS

Audit Results

Monitor >> Schedule Site Visits >> Audit Results

The **Audit Results** screen is used to record the results and findings of a follow up center site visit after the visit has occurred.

FIGURE 1

3529::qaadmin
01/10/2005
17:04:24.120

Special Pay Auth
Schedule Site Visit
Outcome Survey
Search Qrtly Report
View Alerts
PSR Inconsistencies
Services History
Code Karyotypes

Monitor >> Schedule Site Visit >> Audit Results

Audit Results **Generate Audit Cases**

Entity Code: 75e

Organization Name: Kaiser--San, Francisco

Date of Visit: 1/31/2005

* GDB Staff 1 Last Name: SMITH Search

GDB Staff 2 Last Name: Search

GDB Staff 3 Last Name: Search

Reported Deficiencies: Deficiencies

Requirements: Requirements

Recommendation: Recommendation

* Proposed Next Visit Date: 01-31-2006

Save Back

Patient Name	Accession Number	Date of birth	Medical Record Number	Deficiency
MICHELLE DEFEESON	001-75-211/P - 2003-22	11/9/1967		
MARIA SANCHEZ	253-96-111/P - 2003-11	2/14/1980		
DONNA LEUNG	033-06-051/P - 2003-22	8/14/1979	123	

Enter/Edit Results

1. Information about the site visit, including the **Entity Code**, **Organization Name**, and **Date of Visit** is displayed in a read-only format, based on the information entered on the Schedule Site Visit screen.
2. **GDB Staff (1-3) Last Name** fields are read-only. You must click the Search links next to the fields to search for the name(s) of the GDB Staff member(s) who attended the site visit. **GDB Staff 1 Last Name** is a required field. The last names of up to three GDB Staff members who attended the site visit can be recorded.
3. Enter information about the site visit in the fields provided.
4. Based on the results of the site visit, enter the **Proposed Next Visit Date**. This is a required field.

Audit Results (continued)

FIGURE 2

3529::qaadmin
01/10/2005
17:04:24.120

Monitor >> Schedule Site Visit >> Audit Results

Audit Results **Generate Audit Cases**

Entity Code: 75e
 Organization Name: Kaiser--San, Francisco
 Date of Visit: 1/31/2005
 * GDB Staff 1 Last Name: SMITH [Search](#)
 GDB Staff 2 Last Name: [Search](#)
 GDB Staff 3 Last Name: [Search](#)
 Reported Deficiencies: Deficiencies
 Requirements: Requirements
 Recommendation: Recommendation
 * Proposed Next Visit Date: 01-31-2006

[Save](#) [Back](#)

	Patient Name	Accession Number	Date of birth	Medical Record Number	Deficiency
<input type="radio"/>	MICHELLE PETERSON	001-75-211/P - 2003-22	11/9/1967		
<input type="radio"/>	MARIA SANCHEZ	253-96-111/P - 2003-11	2/14/1980		
<input type="radio"/>	DONNA LEUNG	033-06-051/P - 2003-22	8/14/1979	123	

[Enter/Edit Results](#)

5. Buttons:

- a. Click the **Save** button to save the audit results you have entered.
 - b. Click the **Back** button to return to the Schedule Site Visit screen, discarding any unsaved changes.
6. Client/case grid displays the cases that were specified for auditing during the visit.
 7. To record case audit results about specific cases that were audited during the site visit, click the radio button next to the **Patient Name** in the client/case grid to select it for editing.
 8. **Button:** After selecting a patient's name, click the **Enter/Edit Results** button to navigate to the Case Audit Results for the selected client case.

Batch Run Time Report

Utilities >> Batch Run Time Rept

This screen displays the logs of scheduled batch jobs that have run. A queue of 14 days worth of batch job logs are stored at any given time and are displayed as individual records in the grid.

FIGURE 1

Utilities » Batch Run Time Rept

Batch Job Name	Date Run	Date Complete	Status	Total records processed	Records processed successfully
<input type="radio"/> PNS TRF	1/3/2005 9:05:35 PM	1/3/2005 9:05:35 PM	Completed	30	30
<input type="radio"/> NBS TRF	1/3/2005 9:06:25 PM	1/3/2005 9:06:30 PM	Completed	20	20
<input type="radio"/> PNS Results	1/3/2005 9:14:41 PM	1/3/2005 9:14:46 PM	Completed	30	30
<input type="radio"/> PNS TRF	1/3/2005 9:15:16 PM	1/3/2005 9:15:16 PM	Completed	30	30
<input type="radio"/> NBS Results	1/3/2005 9:18:38 PM	1/3/2005 9:18:43 PM	Completed	20	20
<input type="radio"/> HB Results	1/3/2005 9:18:45 PM	1/3/2005 9:18:51 PM	Completed	20	20
<input type="radio"/> NBS TRF	1/3/2005 9:19:17	1/3/2005 9:19:18	Completed	17	17

1

2

3589::msc
01/27/2005
14:35:56.980

1. Select the report log you would like to view using the radio button on the record.
2. **Buttons:**
 - a. **View Log** – Displays the log for the selected report.

Batch Run Time Report (continued)

FIGURE 2

Utilities » Batch Run Time Rept

Batch Job Name	Date Run	Date Complete	Status	Total records processed	Records processed successfully
<input type="radio"/> PNS TRF	1/3/2005 9:05:35 PM	1/3/2005 9:05:35 PM	Completed	30	30
<input type="radio"/> NBS TRF	1/3/2005 9:06:25 PM	1/3/2005 9:06:30 PM	Completed	20	20
<input type="radio"/> PNS Results	1/3/2005 9:14:41 PM	1/3/2005 9:14:46 PM	Completed	30	30
<input type="radio"/> PNS TRF	1/3/2005 9:15:16 PM	1/3/2005 9:15:16 PM	Completed	30	30
<input checked="" type="radio"/> NBS Results	1/3/2005 9:18:38 PM	1/3/2005 9:18:43 PM	Completed	20	20
<input type="radio"/> HB Results	1/3/2005 9:18:45 PM	1/3/2005 9:18:51 PM	Completed	20	20
<input type="radio"/> NBS TRF	1/3/2005 9:19:17	1/3/2005 9:19:18	Completed	17	17

1

[View Log](#)

NEWBORN SCREENING PROGRAM REPORT

3 Posting Discrepancy Report

SITE	TESTDATE	TEST	RUN	ACCESSION NUMBER	RESULT	POSTED	MESSAGE
31	11/01/2004	TYR	02	306-78-207/21-2004-31	0307.50		Invalid Determination
31	11/01/2004	TSH	02	306-78-207/21-2004-31	0002.10	Yes	Kitlot Mismatch for the Accession Number
31	11/01/2004	TRA	02	306-78-207/21-2004-31	0261.24	Yes	Kitlot Mismatch for the Accession Number
31	11/01/2004	PHE	02	306-78-207/21-2004-31	0216.28	Yes	Kitlot Mismatch for the Accession Number, Ratio Low307.5, Determination Conflict, PKU Alert
72	11/02/2004	TYR	01	307-87-018/21-2004-72	0179.29		Invalid Determination
72	11/02/2004	TSH	01	307-87-018/21-2004-72	0010.20	Yes	Kitlot Mismatch for the Accession Number
72	11/02/2004	TRA	01	307-87-018/21-	0262.25	Yes	Kitlot Mismatch for the Accession Number

3. The selected log is displayed below the main data grid.

Biotinidase Confirmatory Testing Expected List

Data Intake >> Biotinidase Expected List

This screen lists all cases with positive Biotinidase Deficiency screening test results. The cases remain on the list until they are resolved by the CCC.

FIGURE 1

Biotinidase Confirmatory Testing Expected List

Accession Number	Last Name, First Name	AKA	Date of Collection	Gender	Date of Birth	CCC
274-62-003/21-2006-72	GREGORY, SARAH		9/29/2006 12:00:00 AM	Male	10/1/2006 12:00:00 AM	Kaiser Permanente - Southern California
274-60-036/21-2006-71	LUELLA, SAMANTHA		9/30/2006 12:00:00 AM	Male	9/5/2006 12:00:00 AM	Kaiser Permanente - Kaiser North
297-14-077/21-2006-12	GREGOIRE		10/23/2006 12:00:00 AM	Male	10/20/2006 12:00:00 AM	Stanford University Medical Center
297-46-003/21-2006-72	CRAVEN		10/26/2006 12:00:00 AM	Female	10/25/2006 12:00:00 AM	Kaiser Permanente - Southern

1. **Biotinidase Confirmatory Testing Expected List:** Displays all cases with a positive biotinidase deficiency determination until they are resolved by the CCC.
2. Click the appropriate **Accession Number** hyperlink on the grid to enter confirmatory test results for a specific case.

Case Audit Results MC (Metabolic Center)

Monitor >> Case Audit Results MC

The **Case Audit Results MC** screen is used to record audit results for a particular case at a Metabolic Center that was audited during a site visit. To access this screen, click on the Enter/Edit Results button from the Audit Results screen.

GDB-SIS

Monitor >> Case Audit Results MC

MC

Mother's Name: JENNIFER MARTINEZ

Baby's Name: MARTINEZ

Baby's Date of Birth: 7/1/2004

Seen by MD ☒

Seen by RN ☐

Seen by RD ☐

Seen by GC ☐

Comments: Testing

Save Clear Cancel

Case Audit History

Date Of Visit
<input type="radio"/> 1/1/2001

Edit

1. The Mother name and baby name are displayed in a read only format based on the selected case.
2. Enter information about the case audit in the fields provided.
3. **Buttons:**
 - a. **Save** – Saves the case audit information you have entered/modified.
 - b. **Clear** – Clears the case audit information, discarding any changes without saving.
 - c. **Cancel** – Click to return to the **Audit Results** screen, discarding changes
4. All audits that have been saved for the case are displayed in the **Case Audit History** grid. Click the radio button next to the **Date of Visit** to select that audit date for editing.
5. Click the **Edit** button to edit the case audit results for the selected site visit date.

Case Audit Results SCCC (Sickle Cell Counseling Center)

Data Intake >> Case Audit Results SCCC

The **Case Audit Results SCCC** screen is used to record audit results for a particular case at a Sickle Cell Counseling Center that was audited during a site visit. To access this screen, use the 3rd level link 'Case Audit Results SCCC' in the Data Intake module.

FIGURE 1

GDB-SIS

Data Intake >> Case Audit Results SCCC

Client/Case Search
 View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 Update Case (PNS)
 TRF Data Entry (NBS)
 Case Summary (NBS)
 Update Case (NBS)
 Lab Conf
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Addl Test Results
 Audit Data Entry
 Expected Recall (NBS)
 View List of CCR
 NBS DC

SCCC

Mother's Name: OLSEN, SARAH **1**

Baby's Name: **1**

Service Code: 7/9/2004

Baby's Date of Birth:

Site Visit Date:

SCCC Name> **2**

Sickle Cell Counselor Name: ☐

Sickle Cell Counselor Notes: ☐

Pedigree: ☐

Consent for Release of NBS Hb Information: ☐

Initial Counseling Letter to Parent: ☐

Initial Counseling Letter to Clinician: ☐

Consent for Hemoglobin Testing: ☐

Hemoglobin Lab Reports: ☐

Documentation of Results Telephoned: ☐

Contract Liaison Contact Documented: ☐

Interesting Case Documentation: ☐

Result Letter to Parent: ☐

Result Letter to Clinician: ☐

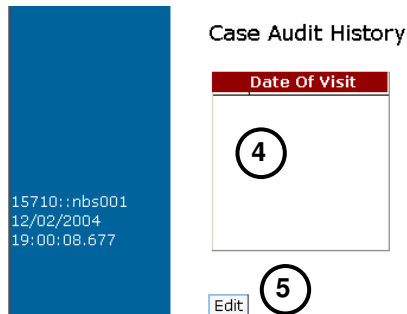
Referral Made Documentation: ☐

Comments: **3**

1. The **Mother's Name** and the **Baby's Name** are displayed in read-only format at the top of the screen.
2. Enter information about the case audit in the fields provided.
3. **Buttons:**
 - a. Click the **Save** button to save the case audit information you have entered. A new row will be added to the Case Audit History grid.
 - b. Click the **Clear** button to clear the case audit information, discarding any unsaved information.
 - c. Click the **Cancel** button to return to the **NBS Case Summary** screen, discarding any unsaved data.

Case Audit Results SCCC (Sickle Cell Counseling Center) (continued)

FIGURE 2



4. All audits that have been saved for the case are displayed in the **Case Audit History** grid. Click the radio button next to the Date of Visit to select that audit date for editing.
5. Click the **Edit** button to edit the case audit results for the selected site visit date.

Case Notes

The **Case Notes** screen is used by Case Coordinators to retain and track comments relevant to a case. In addition, comments are added to the case automatically from comments on the update case screen. All comments for the case are available on the **Case Notes** screen.

Post PEII PNS Case Notes

Data Intake >> Case Summary (PNS) >> Case Notes

GDB-SIS

Data Intake >> Case Summary (PNS) >> Case Notes

Update Case (PNS) Case Notes Link PNS Cases Re-assign CCC Tracking Events
 Appointments Services History Enter PSR Link Client to Entity Unlink Specimens
 GA Calculator

Client Name: 1 ZUCKERMAN, NEIDI Date of Birth: 12/12/1978

Valid Specimens (used for Risk Assessment)

Trimester	Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
<input type="checkbox"/> 1st Trimester	179-15-370/A -2008-64	06/27/2008	1st T Combined: Screen Positive for T21	Arrange Immediate Referral

2

Associated Specimens

Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
<input type="checkbox"/> 222-15-427/P -2008-64	08/02/2008	2nd T: Insufficient Patient Information	Obtain Correct Patient Information

3

* Add Comment:

4

Save Clear 5

Case Comments: 6

Trimester	Accession Number	Interpretation Code	Case Comments	Date Time	Entered By
1	179-15-370/A -2008-64	FPOSID-I	Patient recent weight is missing	08/12/2008 00:00:00	Moser, Viktor
2	222-15-427/P -2008-64	NSII	Second T specimen	08/12/2008 00:00:00	Moser, Viktor

Post PEII PNS Case Notes (continued)

1. Client information is displayed in a read-only format, based on the client profile.
2. **Valid Specimens** grid displays all the valid specimens related to the case.
3. **Associated Specimens** grid displays all the associated specimens related to the case.
4. Enter comments to add to the case in the **Add Comment** field. Comments can be copied and pasted into the **Add Comment** field.
5. **Buttons:**
 - a. **Save** – Select the check box corresponding to the specimen for which the case notes need to be added, Click to save the comments. Once comments are saved, text entered will be moved from the Add Comment box to a new row in the Case Comments grid (see #4 below).
 - b. **Clear** – Clears all text in the **Add Comment** field, discarding any unsaved data.
6. Each time you save a new comments record, a row will be added to the **Case Comments** grid to display the comments. When comments are saved SIS adds the Trimester, Accession Number, Interpretation Code, Case Comments, User Name, date and time stamp.

Pre PEI and NBS Case Notes

Data Intake >> Case Summary (PNS) >> Case Notes

OR

Data Intake >> Case Summary (NBS) >> Case Notes

The **Case Notes** screen is used by Case Coordinators to retain and track comments relevant to a case. In addition, comments are added to the case automatically from comments on the update case screen. All comments for the case are available on the **Case Notes** screen.

7. Client information is displayed in a read-only format, based on the client profile.
8. Enter comments to add to the case in the **Add Comment** field. Comments can be copied and pasted into the **Add Comment** field.
9. **Buttons:**
 - a. **Save** – Click to save the comments. Once comments are saved, text entered will be moved from the Add Comment box to a new row in the Case Comments grid (see #4 below).
 - b. **Clear** – Clears all text in the **Add Comment** field, discarding any unsaved data.
10. Each time you save a new comments record, a row will be added to the **Case Comments** grid to display the comments. When comments are saved SIS adds the user name, date and time stamp.

Case Summary (NBS)

Data Intake >> Case Summary (NBS)

This screen is used to display the case summary for newborn screening cases. Information displayed on this screen includes specimen collection information, mother and clinician information, related cases and summary of the test results.

FIGURE 1

1. This section will display the current **CCC Assignment**, **Interpretation Version Number** and the **Case Resolution Details**.
2. Buttons:
 - a. **Update:** Click the **Update** button to navigate to the Update Case (NBS) screen where you can modify case information.
 - b. **Back:** Click the **Back** button to return to the previous page without saving.
3. The user can enter a new accession number to view the Case Summary for a different accession number.
4. The **Search** button below the accession number will allow the user to go to the Client Case Search screen and search for another case and return that accession number to this screen.
5. The **Date as of** field displays data at a given point in time. Users are able to enter a different date-time in this field to view a different snapshot of data by entering the new date and clicking the **View** button.

Case Summary (NBS) - (continued)

FIGURE 2

Reassign MC
Enter Other Mutation Test Results
MS/MS Ref Lab Expected
MC Annual Patient Summary
Expected Phe Monitoring
CFC Annual Patient Summary
View CFF File Records

Form Number: 2108030386
 Gender: Male
 Date/Time of Birth: 10/19/2006 21:46
 RBC Transfusion before Collection: No
 Date/Time of Last Transfusion: 10/22/2006 04:30
 Date Specimen Collected: Twin B
 Multiple (A,B,C): 54 Hours
 Age at Collection: Heelstick
 Type of Specimen: MDJ
 Initials of Collector: Not Provided
 If collected < 12 hours of age, Reason? Initial Specimen
 Reason for Test: 0859760
 Medical Record Number: NICU
 Nursery Type: R043
 Hospital Code on TRF: JOHN MUIR MEMORIAL HOSPITAL
 Facility Drawing Specimen: R043
 Hospital Code: BRP TPN HYP
 Feeding: 2607
 Birth Weight(in grams): White
 Race/Ethnicity: Yes
 English Speaking?:
 If No, Primary Language:
 If Other, Specify:
 Are notes present: No

Mother's Information

Mother Name: LEE, DEBBIE
 Maiden Name: SIMS
 Social Security Number: 522-51-5241
 Phone: (925) 551-3182
 Birthdate:
 Medi-Cal Number:

Clinician Information

Physician Name: SCOTT, CHARLES
 Address: 1601 Ygnacio Valley Rd
 Walnut Creek, California, 94598-3122
 Phone: (925) 947 5350
 Fax:
 License: G 035088

Related Cases

Accession Number	Form Number	Last Name	Date of Birth	Collection Date	Hospital Code
------------------	-------------	-----------	---------------	-----------------	---------------

Change Entity Update Entity

6. This area of the screen contains TRF information.
7. The screen displays a case notes indicator with a link to navigate to the Case Notes screen, if any notes are present for the case.
8. **Mother's Information and Clinician Information:** These areas include information populated from the current Client Profile screen.
9. **Buttons:**
 - a. **Change Entity:** This button re-directs the user to the Link Client to Entity screen to change an entity.
 - b. **Update Entity:** This button re-directs the user to the Entity Profile where information is updated.
10. **Related Cases** grid: This grid displays the cases which are linked to the current case. A hyperlink in this grid will allow the user to access the Case Summary details for a selected case.

Case Summary (NBS) - (continued)

FIGURE 3

Overall Adequacy:	11	Adequate Specimen
Code #:		91
Specimen Collected:		ON TIME

Test Results for : 292-95-204/21-2006-12

Test	Date	Disorder	Value	Interpretation
17 Hydroxyprogesterone (17 OHP)	10/22/2006	CAH	15 nmol/L	CAH Negative
HB	10/22/2006	Hemoglobin	F2A	Follow-up Optional
Galactose-1-phosphate uridyl transferase	10/22/2006	Galactosemia	78.01 enzyme units	GAL Negative
TSH	10/22/2006	Hypothyroidism	15.77 mIU/L	Hypothyroidism Negative
Biotinidase	10/22/2006	Biotinidase Deficiency	78.01 ERU	BD Negative
Immuno Reactive Trypsinogen	10/22/2006	CF	1008.01 nmol/L	IRT High Positive
CFTR Mutation Panel	10/22/2006	CF		CFTR Mutation Panel Incomplete
CFTR DNA Sequencing	10/22/2006	CF		CFTR DNA Sequencing Referre
MS/MS	10/22/2006			Negative

[Search for Mailers](#) 12
 [View Case Alerts](#) 13
 [One Page Summary](#) 14

Faxing Options	
<input type="radio"/>	Clinician's Secure Fax Number
<input type="radio"/>	Hospital's Secure Fax Number
<input type="radio"/>	Other Fax Number <input type="text"/> - <input type="text"/> - <input type="text"/> x <input type="text"/>

15 Send Fax Results

Document Identifier	Document Type	Scanned Date
16		

11. The **Test Results For** grid displays results for NBS tests. The CFTR mutation panel and CFTR DNA sequencing panel data will only be displayed if these tests are required based on IRT results.

Note: If the specimen is marked inadequate, all tests will be given an "I" type inadequacy code. Test values will not appear on the Case Summary screen.

A hyperlink re-directs the user to the MS/MS Test Results screen if the test displays an MS/MS test result, and the CF Test Results screen if the test displays a CFTR Mutation Analysis result or CFTR DNA Sequencing result.
12. **Search for Mailers:** A hyperlink re-directs user to the Search for Mailers page.
13. **View Case Alerts:** A hyperlink re-directs user to the Case Alerts page.
14. **One Page Summary:** The **One Page Summary** hyperlink will provide the user with information based on case summary details and current configuration of contact details. It opens a new window to the **One Page Summary** screen.
15. The **Faxing Options** grid sends fax results based on the user's choice of radio button.

Faxing Options: There are three options for sending a fax. When **Send Fax Results** link is clicked, the results for that case will be sent to the clinician/hospital of record or other fax number specified on the Entity Telecom table as a "secure fax number". A warning will be generated if the fax number is not active or secured.

16. The linked images grid (**Document Identifier**) provides access to the image of the Test Request Form or other forms that are associated with the case.

Case Summary (PNS)

Data Intake >> Case Summary (PNS)

The **Case Summary (PNS)** screen is where you can view information about a prenatal case, including basic client information, current interpretation, current status of the case, interpretation factors, clinician information, and test results. If you wish to change any information on this screen, you must click the Update button (see #2 below) and make all of your changes from the Update Case (PNS) screen.

To get to the **Case Summary (PNS)** screen, you can click the Accession Number in the Headline Cases screen or you can use the Client/Case Search screen to locate an existing case. You can also navigate to the case summary screen from other pages like Cases Referred screens etc.

FIGURE 1

1. A summary of basic patient data is displayed in a read-only format, based on the client profile information. The current CCC assignment is displayed along with the version number and additional prenatal screening case information.
2. **Buttons:**
 - a. **Update:** Click the **Update** button to navigate to the Update Case (NBS) screen where you can modify case information.
 - b. **Back:** Click the **Back** button to return to the previous page without saving.
3. The user can enter a new accession number to view the Case Summary for a different accession number. Use the cut and paste icons on the right of the accession number field to automatically copy or paste the accession number.

4. The **Search** button link next to the accession number will allow the user to go to the Client Case Search screen and search for another case and return that accession ID to this screen.
5. **Date as of:** displays data at a given point in time. Users are able to enter a different date-time in the **View as of:** field to view a different snapshot of data. Enter the date and then click the **View** button below the date.

Case Summary (PNS) - (continued)

FIGURE 2

Reassign HC Enter Other Mutation Test Results NS/MS Ref Lab Expected View Holding Tank Records HC Annual Patient Summary Expected Phe Monitoring CFE Annual Patient Summary View CFF File Records	Adequacy Code:	Adequate specimen
	<input type="checkbox"/> Date of Birth:	8/31/1979
	<input type="checkbox"/> Age at Term (in decimal years):	
	<input checked="" type="checkbox"/> Ovum Donor:	Yes
	<input type="checkbox"/> Ovum Donor Date of Birth:	8/31/1975
	<input type="checkbox"/> Age of Ovum Donor:	
	<input type="checkbox"/> Race / Ethnicity:	White, Samoan
	<input type="checkbox"/> Blood Specimen collected on:	4/23/2007
	<input type="checkbox"/> Ultrasound Date performed:	
	<input type="checkbox"/> Gestational Age on that date:	
	<input type="checkbox"/> Gestational Age at Collection:	
	<input checked="" type="checkbox"/> PDC Ultrasound Date:	4/19/2007
	<input checked="" type="checkbox"/> Gestational Age on that date:	15 Weeks 2 Days
	<input type="checkbox"/> Gestational Age at Collection:	15 Weeks 6 Days
	<input type="checkbox"/> First Day of Last Normal Menstrual Period:	
	<input type="checkbox"/> Gestational Age at Collection:	
	<input type="checkbox"/> Date of Most Recent Physical Exam:	
	<input type="checkbox"/> Physical Exam Gestational Age:	
	<input type="checkbox"/> Physical Exam Gestational Age at Collection:	
	<input type="checkbox"/> Dating Method Selected:	PDC Ultrasound
	<input type="checkbox"/> Number of Fetuses in this pregnancy:	1
	<input checked="" type="checkbox"/> Was there a Fetal Reduction?:	No
	<input type="checkbox"/> Patient's Most Recent Weight (in lbs): 125 (in kilos):	
	<input type="checkbox"/> Is the patient an insulin dependent diabetic?:	No
	<input type="checkbox"/> Is there a family history of Neural Tube Defects (Anencephaly, Encephalocele or Spina Bifida) in the mother, father or sibling of the fetus?:	No
<input type="checkbox"/> Has the patient taken Tegretol, Carbatrol, Depakene, Depakote or Trileptal since conception?	No	
<input type="checkbox"/> Has the patient had CVS, First Trimester Screening, or Preimplantation Genetic Diagnosis?	No	
<input type="checkbox"/> How many cigarettes altogether did the patient smoke in the last 7 days? If none, enter zero.:	Yes 1 Cigarette(s) Pack(s)	

6. Interpretation factors are listed in a read-only format. If the interpretation factors have been verified and checked off on the Update Case (PNS) screen, the checkboxes will be filled.

Case Summary (PNS) - (continued)

FIGURE 3

Additional Information ⑦

Alternate Date of Birth: 12389034A
 Medi-Cal Number: 3489023.1
 Medical Record Number: 555-44-4888
 AFP Billing Code: QUEST
 Social Security Number: JK
 Facility where Blood collected: (559) 485 1458
 Collector's Initials:
 Facility Telephone:

Comments ⑧

Comments:
 Are notes present: ⑨ No

Clinician Information

⑩

Change Clinician Update Clinician
 Note: Press 'Change Clinician' to update the present clinician's phone number.

Name: REYNOLDS, MELANIE
 Facility Name:
 Address: 789 Swathmore Lane
 City: Vallejo California 94590
 Primary Contact Number: (559) 457 5919
 Secure Fax Number: (415) 890 8904
 Clinician License: A 999991

Client's Address Information ⑪

Update

Address (Number, Street): 890 Hilly Road
 Address (Apt/Suite #):
 City: Vallejo
 State: California
 Zip: 94590

Client's Contact Information ⑫

Number	Type	Effective Date
(925) 590 1111	HOME	03/20/2007

7. **Additional Information** section can be revised on the Update Case (PNS) screen.
8. **Comments** entered in the comments field on the Update Case (PNS) screen will be displayed here.
9. The screen displays a case notes indicator with a link to navigate to the Case Notes screen if any notes are present for the case.
10. **Buttons:**
 - a. **Change Clinician:** Links the user to the Link Client to Entity screen, where user can input new clinician information.
 - b. **Update Clinician:** Displays the Entity Profile Screen where the user can revise the current clinician's information.
11. **Client's Address Information** displays the current known address for the client. The **Update** button will display the Update Address screen where a new address can be added.
12. **Client's Contact Information** displays the phone number contact for the client. This can be updated on the Update Phone Numbers screen.

Case Summary (PNS) - (continued)

FIGURE 4

Related TRFs 13									
Accession Number	Social Security Number			Last Name	First Name	Date of Birth			
Test Results 14									
Date	Test	ADQ	Values	Un Adj MoM	Wt Adj	IDD Adj	Race Adj	Smk Adj	Final MoM
04/22/2007	AFP	A	250.6100 ng/ml						
04/22/2007	HCG	A	19.7100 IU/ml						
04/22/2007	UE3	A	71.4800 ng/ml						
04/22/2007	INH	A	21.3700 pg/ml						
Interpretation: 15 Risk Assessment: Authorized Action: Date at 24 weeks: Ovum Donor Risk Assessment: Authorized Action:				Insufficient Patient Information NO RESULT Risk assessment is not possible because essential patient information requested on the AFP form is insufficient or inconsistent. Authorized action cannot yet be determined. Call the AFP coordinator office listed below if clarification or assistance is needed. CONTACT THE COORDINATOR OFFICE LISTED BELOW to correct insufficient or inconsistent patient information. 6/19/2007					
16 Search for Mailers				17 View Case Alerts					
18 Faxing Options									
<input type="radio"/> Clinician's Secure Fax Number									
<input type="radio"/> Other Fax Number				<input type="text"/> - <input type="text"/> - <input type="text"/> x <input type="text"/>					
19 Send Fax Results									
20 Document Identifier									
Document Type					Scanned Date				

13. **Related TRFs:** This grid displays the cases, which are linked to the current case. A hyperlink in this grid will allow the user to access the Case Summary details for a selected case.
14. **Test Results:** Results for the case are displayed in read-only format.
15. Interpretation and associated information about the case is displayed.
16. **Search for Mailers:** Re-directs the user to the Search for Mailers screen.
17. **View Case Alerts:** Re-directs the user to the Case Alerts screen.
18. The **Faxing Options** grid sends fax results based on the user's selected choice of radio button
19. **Send Fax Results:** The results for a case will be sent to the clinician/hospital of record or other fax number specified on the Entity Telecom table as a "secure fax number". A warning will be generated if the fax number is not active or secured.
20. The linked images grid provides access to the image of the Test Request Form or other forms that are associated with the case.

Cases Referred – CF Center

Follow-Up Center >> Cases Referred

This screen will list cases referred to a specific CF Center (CFC) and allow the users to link to case information.

FIGURE 1

Follow Up Center >> Cases Referred

*Center Type: 1 CF Center

*Center Code: CF01 Search

Center Name: CF Center - Richmond

2 Go Clear Back

New Referrals

Select	Accn Number	Last Name	First Name	DOB	Gender	CCC Code	Date Referred
3 C	275-04-007/21-2006-22	PHAM	GIRL	09-30-2006	Female	N099	02-19-2007

1 Select

1. The **Center Type** and **Center Code** fields will be pre-populated in a read-only format based on your log-in information. They will either be read-only or editable depending on the security access enabled for the SIS user logging in.
2. **Buttons:**
 - a. **Go:** Allows you to view cases referred to your follow-up center.
 - b. **Clear:** Removes all information from the screen including **Center Type**, **Center Code**, and **Center Name** from the cases referred grid.
 - c. **Back:** Displays the previous screen in SIS.
 - d. **Select:** Advances to the next screen combined with the user selection of a radio button on a grid.
3. **New Referrals:** Displays all new cases referred to the CF Center by the Newborn Screening Area Service Center or new cases transferred from another CF Center or CF Carrier Counseling Center.

Cases Referred - CF Center (continued)

FIGURE 2

lgaffney:::001
 03/09/2007
 13:30:51.283

4

Pending Cases

Select	Accn Number	Last Name	First Name	DOB	Gender	Case Resolution	Sweat Test Entered	CFF Number
<input type="radio"/>	2006-22					- Cystic Fibrosis		
<input type="radio"/>	274-19-220/21-2006-22	MEZA		09-07-2005	Female	Resolved - Cystic Fibrosis		N/A
<input type="radio"/>	274-22-035/21-2006-71	CRINER		09-29-2006	Female	Resolved - Cystic Fibrosis		N/A
<input type="radio"/>	274-00-077/21-2006-72	MEZA		09-07-2005	Female	Resolved - Cystic Fibrosis		N/A
<input type="radio"/>	278-51-065/21-2006-71	HARRIS-MA		10-03-2006	Male	Resolved - Suspect Cystic Fibrosis		N/A
<input type="radio"/>	279-88-312/21-2006-11	CWYNAR		10-03-2006	Male	Pending		N/A

5

Resolved Cases

Select	Accn Number	Last Name	First Name	DOB	Gender	Case Resolution
<input type="radio"/>	274-69-071/21-2006-72	RUIZ	BOY	09-27-2006	Male	Lost to follow-up

4. **Pending Cases:** Displays all cases for which a CFSR has been entered, but not yet completed.
5. **Resolved Cases:** Displays all cases for which follow-up has been completed.

Cases Referred – CF Counseling Center

Follow-Up Center >> Cases Referred

This screen will list cases referred to the CF Counseling Center (CFCC) and allows the users to link to case information.

FIGURE 1

Follow Up Center >> Cases Referred

*Center Type: CF CCC

*Center Code: CF02 Search

Center Name:

Go Clear Back

New Referrals

Select	Accn Number	Last Name	First Name	DOB	Gender	Date Referred	Case Status
<input type="radio"/>	296-10-139/21-2006-32	ALEJANDRE		10-19-2006	Female	01-22-2007	Referred to CF Carrier CC

1 Select

1. The **Center Type** and **Center Code** fields will be pre-populated. They will either be read-only or editable depending on the security access enabled for the SIS user logging in.
2. **Buttons:**
 - a. **Go:** Allows you to view all cases referred to the CFCC.
 - b. **Clear:** Removes all information from the screen including the **Center Type**, **Center Code**, and **Center Name** from the **Cases Referred** grid.
 - c. **Back:** Displays the previous screen in SIS.
 - d. **Select:** Advances to the next screen combined with the user selection of a radio button on a grid.
3. **New Referrals:** Displays all cases referred to the CFCC after the parents requested carrier counseling, and for which no information has been entered on the CF Carrier Counseling Checklist.

Cases Referred - CFCC (continued)

FIGURE 2

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 03/09/2007
 13:33:18.473

4

Pending Resolution

Select	Accn Number	Last Name	First Name	DOB	Gender	Date Referred	Case Status
<input type="radio"/>	297-01-141/21-2006-21	MERCADO	KAYLEE	10-21-2006	Female	02-19-2007	Counseling Completed

5

Resolved Cases

Select	Accn Number	Last Name	First Name	DOB	Gender	Date Resolved	Case Status
<input type="radio"/>	293-79-030/21-2006-32	HUANG		10-17-2006	Male	02-19-2007	Case Closed

4. **Pending Cases:** This grid displays all cases for which a CF Carrier Counseling Checklist has been started but not completed and/or the counseling letters have not been completed.
5. **Resolved Cases:** This grid displays all resolved cases up to 30 days after the case resolution date.

Cases Referred – Metabolic Center (MC)

Follow-Up Center >> Cases Referred

This screen lists cases referred to a specific Metabolic Center (MC) and allows the users to link to case information.

FIGURE 1

1. If you only have access to view information for one Follow-Up Center, the **Center Type** field will be pre-populated in a read-only format, based on your log-in information. However, if you have access to view information for multiple Follow-Up Centers, you must select a Center Type (Prenatal Diagnosis Center, Sickie Cell Counseling Center, CF Center or CFCC Center). **Center Type** is a required field denoted by the (*).
2. **Center Code** is a required field denoted by the (*). If you do not know the Center Code, click the **Search** link to search for and select an entity.
3. **Buttons:**
 - a. **Go:** Allows you to view all cases referred to your Follow-Up Center.
 - b. **Clear:** Removes all information from the screen including the **Center Type**, **Center Code**, **Center Name** and the **Cases Referred** grid. After your first search, click the **Clear** button to remove all previously reviewed patient appointment information to search for a second Follow-Up Center's referrals.
 - c. **Back:** Displays the previous screen in SIS discarding any unsaved additions or changes.

4. **Cases Referred** grid displays all cases referred to your Follow-Up Center and the appointment status (Scheduled, No Show, Cancelled, or Kept). The grid entries can be sorted (alphanumeric ascending or descending order) by clicking on any of the column names.
- a. **Accn. Number:** Clicking an Accession Number link will navigate to the Case Summary (PNS) screen.
 - b. **Last Name:** Clicking the Last Name link will navigate to the Client Profile screen.
 - c. **Appt. Status:** Clicking the Appt. Status link will navigate to the Schedule and View Appointment information screen where appointments can be made or appointment status modified.

Cases Referred - Metabolic Center (continued)

FIGURE 2

lgaffney:001
04/09/2007
00:00:00.000

Pending Cases

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Cmnts?
215-74-055/21-2005-22	MERCADO AKA Contreras-Mercado	Jhaved	07-29-2005			Not Scheduled	06-23-2006	N099	N
025-90-437/21-2006-21	JACKSON	JADEN	01-20-2006	05-09-2006	1500	Scheduled	01-30-2006	N099	Y
039-41-237/21-2006-22	CHOW aka Conz	Finley	02-04-2006	04-25-2006	1500	Scheduled	02-13-2006	N099	Y
220-64-334/21-2006-11	RICHARDSON	TY	08-02-2006	10-10-2006	1300	Scheduled	08-10-2006	N099	N
234-18-186/21-2006-22	RUDOLPH aka Mendez	BOY Diego	08-18-2006	10-24-2006	1300	Scheduled	09-18-2006	N099	N
243-58-023/21-2006-72	DESMOND	Thomas	08-27-2006	09-12-2006	1300	Scheduled	09-08-2006	N094	N
262-95-216/31-2006-22	ABE BROWER	EYAL	09-05-2006			Not Scheduled	09-20-2006	N099	N
269-45-172/21-2006-22	SALAZAR	BOY	09-21-2006			Not Scheduled	09-27-2006	N099	N
269-31-320/21-2006-22	NAVARRO	MALE	09-20-2006			Not Scheduled	09-27-2006	N099	N

Resolved Cases

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Case Status	Disorder	Date Referred	CCC Code	Cmnts?
269-45-172/31-2006-22	RICHIE	BOY	09-21-2006	09-12-2006		RESOLVED DISORDER	PKU	09-20-2006	N 099	

Phe Monitoring Resolved Cases

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Case Status	Disorder	Date Referred	CCC Code	Cmnts?
262-95-216/31-2006-22	JIMMY	BOY	08-27-2006	10-24-2006		RESOLVED DISORDER	PKU	09-08-2006	N 099	

5. Case status for the above three grids will come from the most recent case status entry from the MSR table. After an MSR form is completed, the case will move down to one of these three grids – **Pending Cases**, **Resolved Cases**, or **Phe Monitoring Resolved Cases**.

Cases Referred – PDC, SCCC

Follow Up Center >> Cases Referred

The **Cases Referred** screen will allow you to view referrals and appointment information at a specific Prenatal Diagnosis Center (PDC) and Sickle Cell Counseling Center (SCCC).

FIGURE 1

Follow Up Center >> Cases Referred 1

*Center Type: 2 Prenatal Diagnosis Center (PDC)

*Center Code: 3 03a Search

Center Name: Prenatal Diagnosis of Northern Calif.

Go Clear Back 4

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Date Services Authorized To	Services Authorized	Cmnts?
214-22-113/P-2005-32	GONZALEZ	MARIA	12-21-1986	09-12-2005	0000	Kept	12-31-2008	52	10-03-2005	GC, US, AM, KA, AF	N
001-98-033/P-2006-22	ALVAREZ	LILIANA	04-06-1981	08-25-2008	0000	Kept	08-25-2008	52	03-02-2006	GC, US, AM, KA, AF	N
002-85-015/P-2006-22	KALLA	BRENDA	12-07-1975	02-17-2006	1212	Scheduled	08-30-2008	52	02-17-2006	GC, US, AM, KA, AF	N
002-31-011/P-2006-31	OCHOA	ANGELINA	10-02-1981	08-26-2008	0000	Kept	08-26-2008	52	02-17-2006	GC, US, AM, KA, AF	N
003-02-114/P-2006-32	YU	YE LI	10-10-1969	08-26-2008	0000	Kept	08-26-2008	59	02-05-2006	GC, US, AM, KA, AF	N

1 2 3 4 5 6 7

Cancelled Referrals for last 7 days

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Date Services Authorized To	Services Authorized	Cmnts?
096-25-092/P-2004-21	MIROLA	BECKY	12-23-1970			Not Scheduled	06-20-2008	51			N
096-25-092/P	MIROLA	BECKY	12-23-			Not Scheduled	06-20-	51			N

1. Navigation and screen name.
2. If you only have access to view information for one Follow-Up Center, the **Center Type** field will be pre-populated in a read-only format, based on your login information. However, if you have access to view information for multiple Follow Up Centers, you must select a Center Type (Prenatal Diagnosis Center (PDC), Sickle Cell Counseling Center (SCCC) or Metabolic Center (MC) site). Center Type is a required field denoted by the (*).
3. **Center Code** is a required field denoted by the (*). When Center Code is unknown the **Search** link allows you to search and select an entity.
4. **Buttons:**
 - a. **Go** – allows you to view all of the cases referred to your follow-up center.
 - b. **Clear** – removes all information from the screen including the **Center Type**, **Center Code**, **Center Name** and the cases referred grid. After your first search, click the **Clear** button to remove all previous reviewed patient appointment information in order to search for a second follow-up center's referrals.
 - c. **Back** – Displays the previous screen in SIS discarding any unsaved additions or changes.

Cases Referred – PDC, SCCC (continued)

FIGURE 2

Follow Up Center >> Cases Referred

*Center Type: Sickle Cell Counselling Center (SCCC)

*Center Code: SCCC2 Search

Center Name: SICKLE CELL FOUNDATION

Go Clear Back

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Comments
210-08-207/21-2003-31	LIBORIO-BARRERA	ANTHONY	07-26-2003			Not Scheduled	08-26-2008	N097	N
059-90-061/21-2006-31	CAMPBELL	MASYA	02-24-2006			Not Scheduled	03-09-2006	N098	N
208-47-064/21-2006-31	OUTTEN	LEBRON	07-24-2006			Not Scheduled	08-07-2006	N098	N
016-31-043/21-2007-31	OREA	CYNTHIA	01-13-2007			Not Scheduled	02-07-2007	N098	N

Cancelled Referrals for last 7 days

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Comments
-------------	-----------	------------	-----	-----------	-----------	-------------	---------------	----------	----------

5. **5a. Cases referred (PDC)** grid displays all cases that have been referred to your follow-up center and the appointment status of each (Scheduled, No Show, Cancelled or Kept). When the Appointment Status is changed to "Kept," for a PNS case, it will automatically drop off of the Cases referred grid in seven days. Cancelled referrals will be displayed in the Cancelled referrals grid. The grid entries can be sorted (alphanumeric ascending or descending order) by clicking on any of the column names.
 - a. **Accn Number** – Clicking an Accession Number link will navigate to the old Case Summary (PNS) screen for Pre PEII Cases and will navigate to the new Case Summary (PNS) screen for Post PEII Cases.
 - b. **Last Name** – Clicking the Last Name link will navigate to the Client Profile screen.

Cases Referred – PDC, SCCC (continued)

- c. **Appt Status** – Clicking the Appt Status link will navigate to the Schedule and View Appointment Information screen where appointments can be made or appointment status modified.
- 5b. Cases referred (SCCC)** grid displays all cases that have been referred to your follow-up center with and the appointment status of each (Scheduled, No Show, Cancelled or Kept Cancelled referrals will be displayed in the **Cancelled referrals** grid. The referral grid entries can be sorted (alphanumeric ascending or descending order) by clicking on any of the column names.
 - a. **Accn Number** – Clicking an Accession Number link will navigate to the Case Summary (NBS) screen.
 - b. **Last Name** – Clicking the Last Name link will navigate to the Client Profile screen.
 - c. **Appt Status** – Clicking the Appt Status link will navigate to the Schedule and View Appointment Information screen where appointments can be made or appointment status modified.
- 6. **Cancelled Referrals for last 7 days** grid will display information for patients that have cancelled appointments within the last 7 days. Alert 5 “Patient appointment cancelled. Please follow-up” is sent to the CCC.

CCR (Confidential Case Report)

Data Intake >> View List Of CCR >> CCR

This screen allows you to view, enter, and edit a Confidential Case Report (CCR) for a specified PNS client. Once a completed form is saved, the data is available for review by the Registry Monitor as a possible case for the NTD and/or Chromosomal Registries. If there is more than one CCR source available for the same client, you must make independent choices regarding which data to enter. In effect, you will manually consolidate the data from multiple CCR sources into one CCR record in SIS.

CCR (Confidential Case Report) - (continued)

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Uti

Data Intake » View List of CCR » CCR

Client Name: ESPINOZA, ESTEFANA Date of Birth: 9/2/1963
 Accession Number: 311-40-141/P -2004-21

Baby's Information 1

Name: _____ Date of Birth: _____ 2
 Gender: _____ [Search](#)

Additional Information 3

Fetus Letter Code: Pregnancy Id:
 Source of Data Entry: Use for Consolidation: ☒

Source Information

Contact Person Regarding this Form:
 Telephone Number: x
 Facility Type: ☐ Cytogenetic Lab ☐ PDC ☐ Hospital ☒ Vital Statist
☐ MD ☐ Birth Defects ☐ Unknown ☐ Other

If Other, Specify: _____
 PDC or Cytogenetic Lab Code: [Search](#) 5
 Facility Name and Address:

1. **Baby's Information** section is used to link the baby client to the mother client, when applicable.
2. Click the **Search** link to navigate to the **Maintain Client Relationships** screen to select the baby's client ID from the list of clients related to the mother.
3. **Additional Information:** Fetus Letter Code, Pregnancy Id, Source of Data Entry and Use for Consolidation information are displayed.
4. **Source Information:** These fields are entered to track details about the source of the CCR, such as contact person, telephone number, and facility type.
5. In order to obtain the **PDC or Cytogenetic Lab Code** and **Facility Name and Address** for a PDC or Cytogenetic Lab, you must click the **Search** link, which directs you to the Search Entity screen.

CCR (Confidential Case Report) - (continued)

FIGURE 2

Pregnancy Information	
Last Menstrual Period:	10 - 28 - 2004
Calculated From EDC:	<input type="checkbox"/>
Estimated Date of Confinement (EDC):	08 - 04 - 2004
Calculated From LMP:	<input checked="" type="checkbox"/>
If Mother's Birthdate is unknown, please provide an approximation of her age at EDC:	
Number of Fetus/Infants in this Pregnancy including Fetal Demises:	1
Number of these Fetuses/Infants affected with a Birth Defect:	1
Pregnancy Status:	Continuing Pregnancy
If Other, Specify:	
Date of Continuing Pregnancy:	10 - 01 - 2004
Date of Status:	10 - 01 - 2004
Gestational Age at time of Status:	20 Weeks
Method used to determine Gestational Age:	LMP
Additional Infant Information	
Infant's Birthweight:	
If deceased, Date of Death:	

6. **Pregnancy Information:** These fields are entered to track details about the pregnancy, such as LMP date, EDC, pregnancy status, etc.
7. Only one of **Calculated from EDC** (for LMP field) or **Calculated from LMP** (for EDC field) should be checked.
8. **Additional Infant Information:** These fields are entered to track other details about the infant.

CCR (Confidential Case Report) - (continued)

FIGURE 3

Hospital Information

Name and Address of Birth Hospital: Alta Bates Kaiser Search

Mother's Medical Record Number at Birth Hospital: 12345678

Infant's Medical Record Number at Birth Hospital:

Name and Address of Transfer Hospital: Search

Infant's Medical Record Number at Transfer Hospital:

If transferred, Date of Transfer: - - -

Physician Information

Name and Address of Mother's Physician: Michael John 1 Schooner Ct Richmond CA 94804 Search

Telephone Number of Mother's Physician: - - - Ext. : -

Name and Address of Infant's Physician: Search

Telephone Number of Infant's Physician: - - - Ext. : -

9. **Hospital Information:** These fields are entered to track details about the birth and transfer Hospital. In order to obtain the **Name and Address of Birth** or **Transfer Hospital**, you must click the Search link, which directs you to the Search Entity screen.
10. **Physician Information:** These fields are entered to track details about the mother's and/or infant's physician. In order to obtain the **Name and Address of Mother's** or **Infant's Physician**, you must click the Search link, which directs you to the Search Entity screen.

CCR (Confidential Case Report) - (continued)

FIGURE 4

Fetus/Infant Defect Diagnosis (11)

Chromosomal Abnormalities (12)

Karyotype

Karyotype Classification:

Inheritance of Structural Re-arrangements:

Cytogenetic Lab Specimen Number:

Specimen Type:

If Other, Specify:

Is this a Postnatal Specimen to confirm a Prenatal Result?

Sampling Date:

Gestational Age at Time of Sampling:

Method used to determine Gestational Age:

Reason for Sample:

If Other, Specify:

If Sampling Date unknown, give Final Result Date:

Karyotype Classification (13)

Karyotype Classification:

Is this a Postnatal Specimen to confirm a Prenatal Result?

11. **Fetus/Infant Defect Diagnosis:** These fields are entered to track details about any Fetus/Infant defects. Separate sections are available to distinguish between Chromosomal Abnormalities and NTDs (see #s 11 and 13).
12. **Chromosomal Abnormalities:** These fields are entered to track details about any Chromosomal Abnormalities, such as karyotype and classification, specimen type, reason for sample, etc.
13. For **Karyotype Classification**, if the coding program identifies more than four codes for the case, the first four will be displayed in the fields, and the checkbox will be filled.

CCR (Confidential Case Report) - (continued)

FIGURE 5

Neural Tube Defects
Neural Tube Defect Diagnosis:

☐ Anencephaly ☐ Rachischisis
☐ Cranio-Rachischisis ☐ Iniencephaly
☐ Encephalocele ☒ Spina Bifida
☐ Unknown ☐ Other

If Other, Specify: _____

Type of Spina Bifida:

Is Hydrocephaly Present?

Is the NTD Part of a Syndrome?

If Yes, specify Syndrome: _____

Are there Other Abnormalities Present?

If Yes, specify Other: _____

Prenatal Genetic Procedures performed to detect Neural Tube Defect - Ultrasound

Prenatal Procedure: ☒ Ultrasound

Date Procedure Performed: 09 - 01 - 2004

Name & Address of Facility where Procedure Performed: Alta Bates Kaiser
890 Marina Bay
Pkwy Richmond CA [Search](#)

Gestational Age of Fetus (Weeks/Days): 16 / 1

Did Procedure detect NTD:

14. **Neural Tube Defects Diagnosis:** These fields are entered to track details about the NTD diagnosis, such as type of NTD, spina bifida, syndrome, etc.
15. **Prenatal Genetic Procedures performed to detect Neural Tube Defect – Ultrasound:** These fields are entered to track details about the ultrasound, such as date performed, facility performed, if the procedure detected a NTD, etc. In order to obtain the **Name and Address of Facility where Procedure Performed**, you must click the Search link, which directs you to the Search Entity screen.

CCR (Confidential Case Report) - (continued)

FIGURE 6

Prenatal Genetic Procedures performed to detect Neural Tube Defect - Amniocentesis

Prenatal Procedure: Amniocentesis ☒

Date Procedure Performed: 09-01-2004

Name & Address of Facility where Procedure Performed: Alta Bates Kaiser
890 Marina Bay
Pkwy Richmond CA [Search](#)

Gestational Age of Fetus (Weeks/Days): 16 / 1

Did Procedure detect NTD: Yes

AF-AFP Level (in M.o.M.): 111.11

AF-AChE Result: Positive

If NTD was diagnosed Postnatally, when was it diagnosed? Select

If Other, Specify:

Date of Diagnosis: 09-12-2004

Was the Fetal Abnormality confirmed? Yes

Method(s) used for confirmation of Fetal Abnormality: Ultrasound and Amnio

If Other, Specify:

What was the Source or Sources of Your Confirmation? ☒ Ultrasound Report ☒ Amnio Report
☐ Autopsy / Path Report ☐ Clinician Notes
☐ Delivery Room Report ☐ Unknown
☐ Other

If Other, Specify:

16. Prenatal Genetic Procedures performed to detect Neural Tube Defect –

Amniocentesis: These fields are entered to track details about the amniocentesis, such as date performed, facility performed, amniocentesis results, etc. In order to obtain the **Name and Address of Facility where Procedure Performed**, you must click the Search link, which directs you to the Search Entity screen.

17. General NTD diagnosis information can be tracked, such as date of diagnosis, confirmation of fetal abnormality, sources of confirmation, etc.

CCR (Confidential Case Report) - (continued)

FIGURE 7

Comments: 18

*Part of Registry: 19 NTD

20

Document Identifier	Document Type	Scanned Date
---------------------	---------------	--------------

21 Save Reset

18. **Comments** is a free text field. You may enter any comments for this CCR.

19. **Part of Registry** is a required field. You must select a registry (NTD, Chromosome, or both) to which to add the CCR information.

20. This grid will display information about the scanned CCR forms, and provides a link to view each CCR image for the case.

21. **Buttons:**

- Save** button saves your data in SIS. Once the data is saved, it can be reviewed by the Registry Monitor as a possible case for the NTD and/or Chromosomal Registry. Warnings may appear when you attempt to save the data. These warnings may be overridden, so you may save the data successfully despite potential errors flagged by the field level validations.

Reset button reloads the screen and clears the information from all fields, discarding any unsaved data.

Certification

Entity >> Entity Profile >> Certification

The **Certification** screen is used to view, create and update certification information for an entity. Certification can apply to people, laboratories, organizations, etc.

Users with proper security settings can only edit **Certifications** for NT practitioner

FIGURE 1

Entity ID: 4277 Entity Code:

Entity Name: Smith, Robert

Summary of Certifications

Status	Certification Type	Certification Name/Number	Start Date	End Date
<input type="radio"/> Board Certified	American Board of Genetic Counseling (ABGC)	1111	12-17-2004	12-31-9999

Add Edit

1. Information about the entity that is currently selected is displayed in a read-only format. To update this information you must use the **Entity Profile** screen.
2. The **Summary of Certifications** grid displays existing certification information for the selected entity.
3. **Buttons:**
 - a. Click the radio button next to the certification and then click the **Edit** button to make changes to the selected certification record (see **FIGURE 2**).
 - b. Click the **Add** button to add a new certification record for the selected entity (see **FIGURE 2**).

Certification (continued)

FIGURE 2

Entity Search
Entity Profile

Entity >> Entity Profile >> Certification

View Address Entity Relation Maintain CEU's License Certification
Entity Services Cond for PDC Approval

Entity ID: 4277 Entity Code:
Entity Name: Smith, Robert

Enter/edit Certification Information

Status: Active Candidate
*Certification Type: American Board of Radiology (AB Radiology)
Certification Number: 2222
*Start Date: 12-17-2004
End Date: 12-31-9999

Save Clear Cancel

Summary of Certifications

Status	Certification Type	Certification Name/Number	Start Date	End Date
Board Certified	American Board of Genetic Counseling (ABGC)	1111	12-17-2004	12-31-9999
Active Candidate	American Board of Radiology (AB Radiology)	2222	12-17-2004	12-31-9999

4. Update the existing certification information. **Certification Type** and **Start Date** are required fields. If available, enter the certification expiration in the **End Date** field. If no value is entered then SIS will automatically enter "12/31/9999".
5. **Buttons:**
 - a. Click the **Save** button to save the updated certification record with the information you entered in the fields above.
 - b. Click the **Clear** button to clear the information you have entered discarding any unsaved data.
 - c. Click the **Cancel** button to discard any unsaved certification information you have entered and return to the previous screen.

Note: If you click the Add button instead of the Edit button (see Figure 1), the fields will be empty. After clicking the Save button a row will be added to the Summary of Certifications grid.

CF Annual Patient Summary

Data Intake >> CF Annual Patient Summary

The CF Annual Patient Summary screen captures the patient summary forms that are completed yearly by Cystic Fibrosis Centers on each of their patients. These forms capture the general health and any treatments performed on children who have cystic fibrosis for the first six years of their lives.

FIGURE 1

GDB-SIS

Data Intake >> CFC Annual Patient Summary

Client Name: JOHN, BOY Date of Birth: 9/25/2006
 Accession Number: 274-81-036/21-2006-22

Cystic Fibrosis Center Annual Patient Summary

Select	Date	UserID	Case Status
<input type="radio"/>	04/12/2007	Lgaffney	Active - patient currently being seen at this center

New View Update

Cancel

1. Displays client and case information in read-only format.
2. Lists all CF annual patient summaries that have been completed for the client in the grid. Use the **Select** radio button to indicate the specific annual patient summary to be displayed.
3. **Buttons:**
 - a. **New:** Displays a new, blank annual patient summary form for the patient.
 - b. **View:** Displays the annual patient summary selected in the grid in read-only mode.
 - c. **Update:** Displays the annual patient summary selected in the grid in update mode.
 - d. **Cancel:** Refreshes the screen.

CF Annual Patient Summary (continued)

FIGURE 2

The screenshot shows the 'CF Annual Patient Summary' form. On the left is a blue sidebar with navigation links: 'Cystic Fibrosis Service Report', 'Reassign CF', 'Reassign MC', 'Enter Other Mutation Test Results', 'MS/MS Ref Lab Expected', 'MC Annual Patient Summary', 'Expected Phe Monitoring', 'CFC Annual Patient Summary', and 'View CFF File Records'. The main form area has a header with 'Date: 4/12/2007 8:38:34 AM' and 'User ID: Lgaffney' (callout 4). Below this is the 'Patient Information' section (callout 5). It contains fields for 'Patient Cystic Fibrosis Foundation Number: 1', 'Age of patient today: 3309', and 'Last known patient address and telephone number on record: HIGH Way Apt 1 San Diego California CA 92117 (619)'. A dropdown menu (callout 6) asks 'As far as you know, is this still the patient's address?'. Below it are fields for 'Address (Number, Street):', 'Address (Apt / Suite #):', 'City:', 'State:' (with a dropdown), and 'Zip:'. A checkbox 'Do not validate address' (callout 7) is present. Another dropdown (callout 8) asks 'As far as you know, is this still the patient's telephone number?'. Below it are fields for 'If no, please provide patient's new home telephone number:' and 'Follow-up Status:'. The 'Follow-up Status' dropdown is currently set to 'Active - patient currently being seen at this center'. Below it are fields for 'Date (month/year):', 'If transferred, indicate new center:', 'If patient died, indicate date of death:', 'Was death a result of a complication of cystic fibrosis?', and 'Cause of Death:'.

4. Displays the current date, time and user id for the person logged in .
5. **Patient Information:** Captures patient contact information and high level details regarding the patient's case.
6. Select whether the patient's address is up-to-date. If it is not current, enter the current address, city, state and zip code in the fields that follow. If you prefer that the address not be validated against the post office's dates for accuracy, check the **Do not validate address** checkbox.
7. Select whether the patient's telephone number is up-to-date. If it is not current, enter the current telephone number in the fields that follow.
8. **Follow-Up Status:** Select the follow-up status for the patient.
 - a. If the follow-up status is Transferred, enter the date of the transfer in the **Date (month/year)** fields, and enter the location to which the patient was transferred in the **If Transferred, indicate new center** field.
 - b. If the follow-up status is Lost to follow-up, enter the date the patient was lost to follow-up in the **Date (month/year)** fields.
 - c. If the follow-up status is Moved out of state, enter the date the patient moved out of California in the **Date (month/year)** fields.

- d. If the follow-up status is Refused follow-up, enter the date the patient refused follow-up in the **Date (month/year)** fields.
- e. If the follow-up status is Treatment deemed not necessary, enter the date the treatment was deemed unnecessary in the **Date (month/year)** fields.
- f. If the follow-up status is Patient died, enter the date death, using the calendar if desired. Indicate whether the death was the result of a complication of CF. If not, enter the actual **Cause of Death** in the blank box provided.

CF Annual Patient Summary (continued)

FIGURE 3

Services provided 9

*Services provided by your cystic fibrosis center in the previous calendar year
01/01/2006 through 12/31/2006

☒ Respiratory therapy

☒ Nutritional advice

☐ Laboratory testing

☐ Physical examination

☐ Genetic counseling

☐ Health education

☐ Social services

☐ Other services:

10

* Date of last visit/interaction with patient that occurred in the previous calendar year: 01/01/2006 through 12/31/2006

- - 11

☐ N/A

* Total number of patient visits to your cystic fibrosis center in the previous calendar year: 01/01/2006 through 12/31/2006

* Total number of hospitalizations in the previous calendar year: 01/01/2006 through 12/31/2006

If more than 0, indicate date of admission, total days hospitalized and reason for admission:

Admission Date: - -

Total Days Hospitalized:

Reason:

12

Admission Date	Total Days Hospitalized	Reason

* Total number of home IV Events in the previous calendar year 01/01/2006 through 12/31/2006

* If more than 0, total days on home IV in the previous calendar year 01/01/2006 through 12/31/2006

13

9. **Services Provided:** Captures all of the services that were provided to a patient within a specified time frame.
10. Check the services that were provided to the patient in the specified time frame. If services other than those listed on the screen were provided, check the first available **Other Services** checkbox, and specify the details of the service in the blank box that follows.
11. Determine when the last interaction with the patient occurred.
 - a. If there was at least one interaction within the specified time frame, enter the date that the most recent of interaction with the patient occurred, as well as the total number of visits to the center in the specified time frame. If desired, use the calendar icon to fill in dates.
 - b. If there were no interactions with the patient within the specified time frame, check **N/A**.
12. Enter the total number of times the patient was hospitalized within the specified time frame. If the patient was hospitalized at least once within the specified time frame, enter the details of each stay in the fields that follow. For each stay:
 - a. Enter the date the patient was admitted. If desired, use the calendar icon.
 - b. Enter the total number of days the patient was hospitalized

CF Annual Patient Summary (continued)

- c. Enter the reason for the hospitalization.
 - d. Click the **Add to Grid** button. This will add the details of the stay to the grid below.
13. Enter the number of times the patient was on home IV within the specified time frame. If this occurred at least once, enter the total number of days that the patient was on home IV within the specified time frame.

CF Annual Patient Summary (continued)

FIGURE 4

Measurements 14

Last anthropometric measures and pulmonary function tests taken in the previous calendar year 01/01/2006 through 12/31/2006

Measure/Test	Value	Unit	Date
Height	<input type="text"/>	Select	<input type="text"/>
Weight	<input type="text"/>	Select	<input type="text"/>
FVC	<input type="text"/>	Liters	<input type="text"/>
FEV 1	<input type="text"/>	Liters	<input type="text"/>

15

Total number of FVC measurements taken in the previous calendar year 01/01/2006 through 12/31/2006

If more than 0, average FVC value (L):

16

If 0, select:

☐ Not Done or ☐ Unable to Perform Reliable Test

Total number of FEV1 measurements taken in the previous calendar year 01/01/2006 through 12/31/2006

If more than 0, average FEV1 value (L):

17

If 0, select:

☐ Not Done or ☐ Unable to Perform Reliable Test

Did patient have a transplantation (check all that apply)?

☐ Lung

☐ Heart

☐ Liver

☐ Other (specify):

18

14. **Measurements:** Captures the results of measurements and tests taken on the patient within the specified time frame.
15. Enter the **Value**, **Unit**, and **Date** that the most recent of each measurement and/or test was taken on the patient within the specified time frame. If desired, use the calendar icon to enter dates.
16. Enter the total number of FVC measurements taken on the patient within the specified time frame.
 - a. If at least one measurement was taken, enter the average FVC value (L) that was taken in blank box.
 - b. If no measurements were taken, check whether they were not provided because they were not taken, or because they could not be taken reliably.
17. Enter the total number of FEV1 measurements taken on the patient within the specified time frame.
 - a. If at least one measurement was taken, enter the average FEV1 value (L) that was taken in blank box.
 - b. If no measurements were taken, check whether they were not provided because they were not taken, or because they could not be taken reliably.
18. Check the types of transplantation that the patient has had. If transplantations other than those listed on the screen were performed, check the first available **Other (specify)** checkbox, and specify the type of transplantation in the blank box that follows.

CF Annual Patient Summary (continued)

FIGURE 5

Therapies/Treatments 19

Indicate all therapies prescribed to the patient in the previous calendar year 01/01/2006 through 12/31/2006

<input type="checkbox"/> Oral nutritional supplemental/vitamins	<input type="checkbox"/> Enteral supplemental feeding
<input type="checkbox"/> Parental supplemental feeding	<input type="checkbox"/> Pancreatic enzyme supplements
<input type="checkbox"/> Oral antibiotic therapy	<input type="checkbox"/> Anti-Inflammatory therapy
<input type="checkbox"/> Lung percussion therapy	<input type="checkbox"/> Oxygen therapy
<input type="checkbox"/> Other therapies 1:(specify) <input style="width: 100px;" type="text"/>	<input type="checkbox"/> Other therapies 2:(specify) <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Other therapies 3:(specify) <input style="width: 100px;" type="text"/>	<input type="checkbox"/> Other therapies 4:(specify) <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Other therapies 5:(specify) <input style="width: 100px;" type="text"/>	

Indicate all medications/supplements prescribed in the previous calendar year 01/01/2006 through 12/31/2006

☐ Pancreatic enzyme supplements

☐ Ursodeoxycholic acid

☐ Acetylcysteine/mucomist

☐ Dornase alfa (i.e., Pulmozyme)

☐ Hypertonic saline (inhaled)

☐ Tobramycin (TOBI, inhaled)

☐ Other aminoglycosides (inhaled, e.g. gentamycin)

☐ Colistin (inhaled)

☐ Tobramycin (chronic, oral)

☐ Trimethoprim (chronic, oral)

☐ Ciprofloxacin (chronic, oral)

☐ Cephalosporins (chronic, oral, e.g., penicillin, amoxicillin)

☐ Macrolides (chronic, oral, e.g., azithromycin)

☐ Ibuprofen (high-dose 25-30 mg/kg, oral)

☐ Corticosteroids (oral, e.g., prednisone)

☐ Corticosteroids (inhaled, e.g., fluticasone, flovent, budesonide)

☐ Antifungals (Oral, e.g., itraconazole, Sporanox)

☐ Bronchodilators (Oral)-beta agonists (e.g., Proventil Repetabs, Vomax)

☐ Bronchodilators (oral)-theophylline product (e.g., Theodur, Slo-bid, Uniphyll)

☐ Bronchodilators (inhaled)-beta agonist/short acting (e.g., albuterol, Proventil, Ventolin)

☐ Bronchodilators (inhaled)-beta agonist/long acting (e.g., salmeterol, Serevent, Foradil)

☐ Bronchodilators (inhaled)-anticholinergic/short acting (e.g., ipratropium, Atrovent)

☐ Bronchodilators (inhaled)-anticholinergic/long acting (e.g., tiotropium, Spiriva)

☐ Bronchodilators (inhaled)-combination (e.g., Combivent, Duoneb)

☐ Other medications/ supplements 1:(specify)

☐ Other medications/ supplements 2:(specify)

☐ Other medications/ supplements 3:(specify)

☐ Other medications/ supplements 4:(specify)

Total number of respiratory cultures performed in the previous calendar year 01/01/2006 through 12/31/2006

If 0, select:

☐ Not Done or ☐ Unable to Perform Reliable Culture

If more than 0, check all that apply and select types of cultures obtained

<input type="checkbox"/> No growth/sterile culture	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Normal flora	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Aspergillus (any species)	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Burkholderia cepacia	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Haemophilus influenzae (any species)	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> MRSA (methicillin resistant staph. aureus)	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Pseudomonas aeruginosa (mucoid)	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Pseudomonas aeruginosa (non-mucoid)	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Pseudomonas aeruginosa (unknown)	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Staphylococcus aureus	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Stenotrophomonas (Xanthomonas) maltophilia	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Other pathogen 1:(specify) <input style="width: 100px;" type="text"/>	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy
<input type="checkbox"/> Other pathogen 2:(specify) <input style="width: 100px;" type="text"/>	<input type="checkbox"/> Sputum	<input type="checkbox"/> Throat	<input type="checkbox"/> Bronchoscopy

20

21

22

19. **Therapies/Treatments:** Captures all of the therapies and/or treatments that have been prescribed to the patient in the specified time frames.
20. Check all therapies that were prescribed to the patient in the specified time frames. If therapies other than those listed on the screen were performed, check the **Other therapies** checkbox, and specify the type of therapy in the blank box that follows.
21. Check all medications and/or supplements that were prescribed to the patient in the specified time frames. If medications other than those listed on the screen were performed, check the first available **Other medications/supplements** checkbox, and specify the type of medication in the blank box that follows.

22. Enter the total number of respiratory cultures that were obtained in the specified time frame.
- a. If none were obtained, check whether they were not obtained because they were not done, or because they could not be done reliably.
 - b. If at least one culture was obtained, check the types of cultures that were obtained in the specified time frame. If cultures other than those listed on the screen were obtained, check the first available **Other Pathogens** checkbox, and specify the culture that was obtained in the blank box that follows. For each culture, indicate whether it was obtained from the **Sputum**, **Throat** or via a **Bronchoscopy**.

CF Annual Patient Summary (continued)

FIGURE 6

Health Problems (23)

Indicate all persistent health problems/symptoms the patient experienced in the previous calendar year (check all that apply):

<input type="checkbox"/> Distal Intestinal Obstructive Syndrome (DIOS)	<input type="checkbox"/> Allergic bronchial pulmonary aspergillosis (ABPA)
<input type="checkbox"/> Electrolyte Imbalance	<input type="checkbox"/> Edema/hypoproteinemia/hypoalbuminemia
<input type="checkbox"/> Failure to thrive/malnutrition	<input type="checkbox"/> Abnormal stool/malabsorption
<input type="checkbox"/> Liver disease	<input type="checkbox"/> Renal disease
<input type="checkbox"/> Nasal polyps/sinus disease	<input type="checkbox"/> CF-related diabetes
<input type="checkbox"/> Pancreatitis	<input type="checkbox"/> Asthma
<input type="checkbox"/> Bone Disease	<input type="checkbox"/> Vision problems
<input type="checkbox"/> Hearing loss	<input type="checkbox"/> Other problem 1:(specify) <input type="text"/>
<input type="checkbox"/> Other problem 2:(specify) <input type="text"/>	

(24)

*Global Health Assessment (Select the number that describes the overall health status of the patient at the last visit compared to typical child without cystic fibrosis):

4 - good

Comments

(25)

Save Cancel (26)

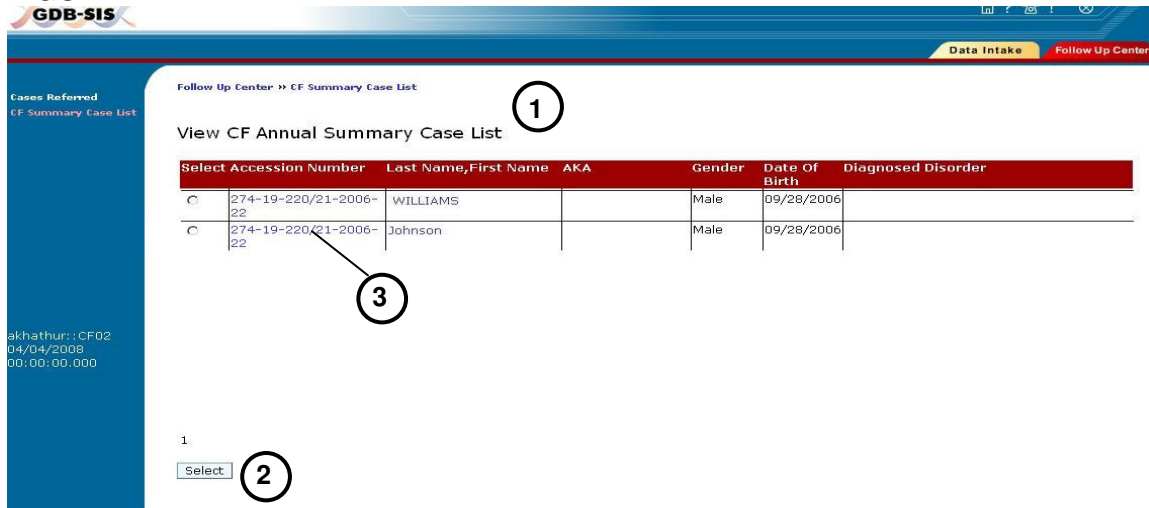
23. **Health Problems:** Captures the health problems experienced by the patient within the specified time frame.
24. Check all persistent health problems and/or symptoms that were experienced by the patient in the specified time frame. If problems other than those listed were experienced, check the first available **Other problem** checkbox, and specify the problem in the blank box that follows.
25. Select the overall health status of the patient at the last visit, by comparing the patient's health against a child who does not have cystic fibrosis. Enter any details in the **Comments** field.
26. **Buttons:**
 - a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated CFSR appears in the **Cystic Fibrosis Services Report** grid that is displayed.
 - b. **Cancel:** Restores the screen with data that existed on the screen after the Save button was last clicked.

CF Annual Summary Case List

Follow up Center >>CF Annual Summary Case List

The **View CF Annual Summary Case List** screen displays a list of all clients who require an annual patient summary from a CF center. The CF Annual Patient Summary is due annually, during the month after the child's birthday.

FIGURE 1



1. **View CF Annual Summary Case List:** Lists all clients who satisfy the following conditions:

- a. The client's case belongs to the user's CF center.
- b. The client's case is resolved as "CF" or "Suspect CF" on the client's most current CFSR.
- c. The client's case is active (i.e. the patient has no previous annual reports OR the Follow Up Status on the patient's most current annual report is Active or Transferred).
- d. The child is within the first six years of his/her life.
- e. An annual patient summary has not been filed for the patient at that age.
- f. The case/client is not already listed in the grid.

The cases are removed from the list after an annual patient summary has been entered for the patient for that age. Use the **Select** radio button to indicate the specific case for which you would like to review the annual patient summaries.

2. **Buttons:**

- a. **Select:** Navigates to the CF Annual Patient Summary screen where it displays a list of annual patient summaries completed for the patient selected in the grid.

3. Click the appropriate **Accession Number** hyperlink on the grid to view the **Case Summary** screen for the case.

CF Carrier Counseling

Data Intake >> Case Summary (NBS) >> Carrier Counseling

This screen allows the CF carrier genetic counselor to record the counseling activities conducted with parents of babies identified as cystic fibrosis carriers by newborn screening.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (NBS) >> CF Carrier Counseling

Client/Case Search
 Id Search
 View Client Profile
 Specimen History
 TRF Data Entry (NBS)
Case Summary (NBS)
 Lab CofC
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Addl Test Results
 Audit Data Entry
 Expected Recall (NBS)
 Case Resolution
 MPKU Registry Search
 Metabolic Service Report
 Reassign MC
 Cystic Fibrosis Service Report
 Reassign CF
 MS/MS Ref Lab Exptd
 Expected Phe Monitoring
 Enter Other Mutation Test Results
 MC Annual Patient Summary
 CFC Annual Patient Summary
 View CFF File Records
 Biotinidase Expected List

Data Intake >> Case Summary (NBS) >> CF Carrier Counseling

Update Case (NBS)	Adequacy Status (NBS)	Case Notes	Link Accn Numbers	Conf Test Results
Re-assign CCC	Tracking Events	Appointments	Services History	Link Client to Entity
Case Audit Results SCCC	Link NBS Accn Numbers	Counselor Checklist SCCC	CF Carrier Counseling	

Client Name: GIRARD, TYLER **1** Date of Birth: 3/5/2004

Accession Number: 070-07-147/21-2004-22

Mother's Name: HEISTER, ROBYN

Father's Last Name: Tyler **2**

Father's First Name: Martin

*Caller's Last Name: Gerrad **3**

*Caller's First Name: Steven

Check all issues discussed: **4**

- ☒ Full Counseling Declined
- ☐ Before counseling review all NBS results
- ☐ Baby's health status
- ☒ Baby does not have disorders tested for by NBS
- ☒ Questions or concerns
- ☒ Baby is a CF carrier
- ☒ Assess client knowledge
- ☐ CF Carrier not disease
- ☐ Baby should continue to be healthy
- ☐ No special treatment or diet needed
- ☐ No blood test needed for baby
- ☐ Meaning of Carrier
- ☐ Baby's mutation
- ☐ Carrier incidence by ethnicity
- ☐ Inheritance pattern; implications for future pregnancies
- ☐ CF symptoms, treatment
- ☐ Carriers rarely have medical problems; exceptions
- ☐ Test limitations, small chance baby could have CF
- ☐ Testing information for parents, family
- ☐ Prenatal testing available for carrier couples

1. Displays client and case information in read-only format.
2. Enter father's last and first name.
3. Enter caller's last and first name. This information is required.
4. Check all issues that were discussed with the client. If the client declined complete counseling, check the **Full Counseling Declined** checkbox.

CF Carrier Counseling (continued)

FIGURE 2



5

Mother's Race/Ethnic Background:

- ☒ White
- ☐ Hispanic
- ☐ Black
- ☐ Chinese
- ☐ Japanese
- ☐ Korean
- ☐ Cambodian
- ☐ Laos
- ☐ Vietnamese
- ☐ Filipino
- ☐ Other Southeast Asian
- ☐ Native American
- ☐ Middle Eastern
- ☐ Asian East Indian
- ☐ Hawaiian
- ☐ Guamanian
- ☐ Samoan
- ☐ Unknown
- ☐ Other

6

Father's Race/Ethnic Background:

- ☒ White
- ☒ Hispanic
- ☐ Black
- ☐ Chinese
- ☐ Japanese
- ☐ Korean
- ☐ Cambodian
- ☐ Laos
- ☐ Vietnamese
- ☐ Filipino
- ☐ Other Southeast Asian
- ☐ Native American
- ☐ Middle Eastern
- ☐ Asian East Indian
- ☐ Hawaiian
- ☐ Guamanian
- ☐ Samoan
- ☐ Unknown
- ☐ Other

5. Check all ethnicities that represent the Race/Ethnic Background of the child's mother.
6. Check all ethnicities that represent the Race/Ethnic Background of the child's father.

CF Carrier Counseling (continued)

FIGURE 3

The screenshot shows a web-based form for CF Carrier Counseling. A blue vertical bar on the left contains white circles with numbers 7, 8, 9, and 10, which are callouts to specific form fields. Callout 7 points to a large text box labeled 'Family history of CF, carriers, CF symptoms:'. Callout 8 points to a list of symptoms under the heading 'Symptoms in baby and to watch for:'. Callout 9 points to a text box labeled 'Referred To:' which is preceded by a 'Referral' checkbox. Callout 10 points to a large text box at the bottom labeled 'Other information to include in letter to MD:' which is preceded by a 'Permission to contact MD' checkbox.

Family history of CF, carriers, CF symptoms:

7

Symptoms in baby and to watch for:

8

☐ Poor weight gain

☐ Difficult 1st bowel movement

☐ Recurrent respiratory illness

☐ Persistent coughing or wheezing

☐ Nasal obstruction

☐ Diarrhea / abnormal stools

☐ Baby tastes salty

☐ Referral

Referred To:

9

☐ Permission to contact MD

Other information to include in letter to MD:

10

7. If applicable, enter any details of the **Family's history of CF, CF carriers and/or CF symptoms** in the blank box.
8. Check all symptoms exhibited by the baby or symptoms to be watched for.
9. If a referral was made, check the **Referral** checkbox, and enter name of person/place to which the referral was made in **Referred To** box.
10. If the patient provided permission for the counselor to contact the baby's doctor, check the **Permission to contact MD** checkbox and enter any other information the counselor should provide when writing to the baby's doctor in the blank box.

CF Carrier Counseling (continued)

FIGURE 4

The screenshot shows a web form for CF Carrier Counseling. On the left, a blue vertical bar contains white circles with numbers 11 through 15. The form fields are as follows:

- 11:** "Genotype of mother, if tested:" section with "Mutation 1:" and "Mutation 2:" dropdown menus (labeled "Select") and a "Tested when?" dropdown menu (labeled "Select").
- 12:** "Genotype of father, if tested:" section with "Mutation 1:" and "Mutation 2:" dropdown menus (labeled "Select") and a "Tested when?" dropdown menu (labeled "Select").
- 13:** "Number of Others Tested:" text input field.
- 14:** "DNA Lab Used:" dropdown menu (labeled "Select") and "Test Type:" dropdown menu (labeled "Select").
- 15:** A checkbox labeled "Counseled in person?". If checked, there is an "If yes, location:" dropdown menu (labeled "Select") and an "Other (specify):" text input field.
- 16:** "Counseling Notes:" section with a large text area.
- 17:** "Save" and "Cancel" buttons at the bottom.

11. If the child's mother was tested, enter the genotype of the mother in the **Mutation** fields, and select when she was tested.
12. If the child's father was tested, enter the genotype of the father in the **Mutation** fields, and select when he was tested.
13. Enter the number of any other individuals who were tested (e.g. siblings, grandparents).
14. Select the DNA Lab that performed the testing and the type of testing that was done.
15. Check whether the family was counseled in person. If so, then indicate the location at which the family was counseled. If the location does not appear in the specified list, select Other, and enter the name of the location in the **Other (specify)** box.
16. Enter any **Counseling Notes** in the blank box provided.
17. **Buttons:**
 - a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the screen is refreshed, and the data that was just entered appears on the screen.
 - b. **Cancel:** Refreshes the screen with data that appeared on the screen when it was last saved. Any changed made after the last Save are lost.

CF Test Results

Data Intake >> Case Summary (NBS) >> CF Test Results

This screen displays the CF Test Results for a newborn screening case. This screen is invoked from the Case Summary (NBS) screen only when CFTR Mutation Panel or CFTR DNA Sequencing Results have been received for the client.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (NBS) >> CF Test Results

Client/Case Search
 Id Search
 View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 TRF Data Entry (NBS)
Case Summary (NBS)
 Lab CoFC
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Addl Test Results
 Audit Data Entry
 Biotinidase Expected List
 Expected Recall (NBS)
 View List of CCR
 Case Resolution
 MPKU Registry Search
 Metabolic Service Report
 Cystic Fibrosis Serv Report
 Reassign CF
 Reassign MC
 Enter Other Mutation Test Results
 MS/MS Ref Lab Exptd
 View Holding Tank Records
 MC Annual Patient Summary
 Expected Phe Monitoring
 CFC Annual Patient Summary
 View CFF File Records

Data Intake >> Case Summary (NBS) >> CF Test Results

Update Case (NBS)
 Re-assign CCC
 Case Audit Results SCCC

Adequacy Status (NBS)
 Tracking Events
 Link NBS Accn Numbers

Case Notes
 Appointments
 CF Carrier Counseling

Link Accn Numbers
 Services History

Conf Test Results
 Link Client to Entity

Client Name: JAMESON Date of Birth: 9/21/2006
 Accession Number: 274-19-220/21-2006-22

CFTR Mutation Panel Incomplete

Type	Name
Mutation 1	delf508

Poly T: 5T/7T

CFTR DNA Sequencing Referred

Type	Name	Description
Mutation 1	delf508	The results indicate heterozygous presence of a previously described mutation 12288ins TA(Alpher Ozgul et. Al., 6-26-03, CFTR Mutation database, Toronto sickkids Hospital) on exon8 of the CFTR gene. This mutation was first described in 2 Hispanic patients with positive sweat tests and pancreatic insufficiency
Novel Variation 1	296+2T>A	The results of this test indicate the heterozygous presence of a previously known deleterious mutation, G542x

Poly T/TG Track: 5T/7T

Additional Interpretations:
 The combination of these known deleterious mutations would be expected to cause Cystic fibrosis if these mutations are on different chromosomes, although the severity of the symptoms cannot be predicted. Family studies would be necessary to determine if these symptoms cannot be predicted. Family studies would be necessary to determine if these mutations are on different chromosomes

Back

1. Displays client and case information in read-only format.
2. Lists the **CFTR Mutation Panel** results received on the case.
3. Lists the **CFTR DNA Sequencing** results received on the case, if applicable.
4. **Buttons:**
 - a. **Back:** Navigates the user back to the Case Summary (NBS) screen populated for the case that appears in the header.

Change Adequacy Status for a Group of Tests

Monitor >> Search for Tests >> Change Adequacy Status

This screen allows the user to change the Adequacy Status for selected tests when there is a suspected problem with a test or group of tests, such as elevated values for an analyte. The user can then change the value of Adequacy status of all selected tests or specimens on this screen.

FIGURE 1

Search For:
*Adequacy Status: A

Save Back

Search Results:

	Accession Number	Test Type	Adequacy	Values	Run Date
<input checked="" type="checkbox"/>	307-16-623/P -2006-32	AFP	A	40.2900 ng/ml	11-03-2006
<input checked="" type="checkbox"/>	307-16-623/P -2006-32	HCG	A	3.1600 IU/ml	11-03-2006
<input checked="" type="checkbox"/>	307-16-623/P -2006-32	UE3	A	10.0900 ng/ml	11-03-2006
<input checked="" type="checkbox"/>	307-16-623/P -2006-32	INH	A	200.4800 pg/ml	11-03-2006

helpdeskuser::001
03/12/2007
19:34:03.733

1. **Search Results:** Select the test for which you want to update the Adequacy Status by checking the box next to the Accession Number. Each analyte is listed in a separate row.
2. **Adequacy Status:** This is a required field. Make a selection from the dropdown box and then click **Save**.
3. Click **Back** button to return to previous SIS screen, discarding any information entered.

Client/Case Search

Data Intake >> Client/Case Search

This screen allows you to search for an existing Client or a Case Record, or to create a new client. You may search using the Accession Number or Form Number alone, or by entering at least two other search criteria together. The New button will direct you to the Client Profile screen and allow you to create a new client.

Client/Case Search (continued)

FIGURE 1

The screenshot displays the GDB-SIS Client/Case Search interface. The top navigation bar includes tabs for Data Intake, Entity, Monitor, Follow Up Center, CCC, and Utilities. The left sidebar lists various search and management options. The main search area contains the following fields:

- Accession Number (with a dropdown menu, callout 1)
- Accession Range (with a dropdown menu, callout 2)
- Form Number
- Form Range
- Patient's Last Name (text input: allis)
- Patient's First Name (text input: rosi)
- Birth Date (with a date picker)
- Date Range (with a dropdown menu)
- Social Security Number (with a dropdown menu)
- Collection Date (with a date picker)
- Collection Range (with a dropdown menu)
- Hospital Code
- Medical Record Number
- Part of Registry (dropdown menu: Select)
- SCCC Service Code Number

Below the search fields are the Search Options:

- ☐ Partial Name
- ☐ Phonetic Spelling
- ☐ Other Name

Callout 3 points to the Search Options section.

1. **Accession Number or Form Number** can be used individually as search criteria.
 - a. **Accession Range** allows you to specify a range of sequence numbers to return in the search. For example, if "5" is selected, the search will only return accession numbers with a sequence number 5 above, and 5 below your specified accession number.
 - b. **Form Range** allows you to specify a range of form numbers to return in the search. For example, if "5" is selected, the search will only return forms with a form number 5 above, and 5 below your specified form number.
2. If neither the Accession Number nor Form Number is available, at least two of the remaining fields must be used together in order to search.
3. **Search Options** allows you to specify the type of search you wish to perform.
 - a. **Partial Name** allows you to enter part of a name, and return all matching records.
 - b. **Phonetic Spelling** allows you to enter the phonetic spelling of a name, and return all matching records.
 - c. **Other Name** allows your search to include both "aliases" and primary name, and return all matching records. An Alias can be entered for a client through the Update Name 3rd level link on the Client Profile screen, which allows you to enter additional names for a client.

Client/Case Search (continued)

FIGURE 2

The screenshot shows the Client/Case Search interface. On the left is a blue sidebar with the text '4092::msc 01/18/2003 00:00:00.000'. At the top, there are three buttons: 'Search' (4), 'Reset', and 'New'. Below these is the 'Search Results' label (5). A table displays search results with columns: Select, Name, Birth Date, Social Security Number, Accession Number, Collection Date, Baby Birth Date, Baby Last Name, and Baby Accession Number. The first row shows a record for 'ALLIS ROSI' with birth date '11/22/1972', social security number '525642645', and accession number '002-63-112/P -2003-12'. The 'Select' column has a radio button (6). Below the table is a large empty box (7). At the bottom, there is a 'Return Selected' button (8).

Select	Name	Birth Date	Social Security Number	Accession Number	Collection Date	Baby Birth Date	Baby Last Name	Baby Accession Number
<input type="radio"/>	ALLIS ROSI	11/22/1972	525642645	002-63-112/P -2003-12	11/31/2003			

4. Buttons:

- a. **Search** button will initiate a search based on the search criteria you have entered.
 - b. **Reset** button, when used before you click the Search button, will clear all information from all fields. When used after you have clicked the Search button, the Reset button will clear all search criteria fields, as well as any search results in the Search Results grid.
 - c. **New** button will direct you to the Client Profile screen, and allow you to create a new client.
5. **Search Results** grid will display all records that match your search criteria. For PDC, MC, and SCCC users only, the Search Results will only display data related to your job function. For example, PDC users will only be able to view cases that have been referred to their PDC. If the search returns more than 50 results, a warning will display, requiring you to refine your search criteria.
 6. Clicking the **Name** link will direct you to the View Client Profile screen.
 7. Clicking the **Accession Number** link will direct you to the Case Summary screen.
 8. If you have been directed from another screen to the Client / Case Search screen, click the radio button next to the record you want to view, and click the **Return Selected** button. You will be redirected back to the screen you came from, and your selected client / case information will be displayed.

Client Profile

Data Intake >> View Client Profile >> Client Profile

This screen allows you to update an existing Client Profile, or to enter information for a new Client. An existing Client Profile can be edited by clicking the Update button on the View Client Profile screen. A new client can be created by clicking the New button on the **Client / Case Search screen**.

Client Profile (continued)

GDB-SIS

Data Intake **Entity** **Monitor** **Follow Up Center** **CCC** **Utilities**

Data Intake >> View Client Profile >> Client Profile

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Add Test Results
NBS DC	NBS NO	NBS MR	NBS OH	NBS TR

Client Name: Banks, Marie Date of Birth: 11/17/1977

*Last Name: Banks
 First Name: Marie
 Middle Initial: J
 Maiden Name:
 Date of Birth: 11-17-1977
 Social Security Number:
 Race / Ethnicity:
☒ White ☐ Hispanic ☐ Black
☐ Chinese ☐ Japanese ☐ Korean
☐ Cambodian ☐ Laos ☐ Vietnamese
☐ Filipino ☐ Other Southeast Asian ☐ Native American
☐ Middle Eastern ☐ Asian East Indian ☐ Hawaiian
☐ Guamanian ☐ Samoan ☐ Unknown
☐ Other (specify)
 *Gender: Female
 Do Not Use Specimen: ☐
 Do Not Use Disclose Patient Information: ☐
 Do Not Contact: ☐
 Save Back

15823::msc
 12/08/2004
 09:57:28.770

1. Client Information:

- When updating an existing client, the **Last Name**, **First Name**, **Middle Initial**, and **Maiden Name** fields will be disabled. Name changes must be performed using the Update Name screen.
- When creating a new client, **Last Name**, **Gender**, and one of **First Name**, **Date of Birth**, or **Social Security Number** are required fields.

2. These “Do Not...” boxes are to be selected by the GDB staff only, based on the patient’s privacy and disclosure preferences.

3. Buttons:

- Save** button will save the data you have entered/updated, and direct you to the View Client Profile screen.
- Back** button: When updating a Client Profile, you will be returned to the View Client Profile screen, without saving any changes. When you are creating a new client, you will be returned to the Client / Case Search screen, without saving any data entered.

Code Karyotypes

Monitor >> Code Karyotypes

The **Code Karyotypes** screen is used to review, recode (if necessary) and approve karyotype codes in SIS. Only the first four karyotype codes are visible on the Code Karyotypes screen.

FIGURE 1

GDB-SIS

Data Intake Entity **Monitor** Follow Up Center CCC Utilities

Monitor >> Code Karyotypes

Accession Number: 001-01-001/P-2003-11

Client Number: 909

Filtered by: Select

Search Clear

Lab Specimen Number: 23116

Lab Name: Kaiser North Cytogenetic

Karyotype: 46,XY,t(6;14)(q27;q22)pat

Comments:

Code 1: Select

Code 2: Select

Code 3: Select

Code 4: Select

Save Cancel

Special ATN:	Select:	Reviewed Type	Sources	Karyo Text	Code 1	Code 2	Code 3	Code 4	More Codes
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	PSR	46,XY,t(6;14)(q27;q22)pat	TransYes	TransRobUnbal			<input type="checkbox"/>

4092::msc
01/10/2003
00:00:00.000

1

Update

1. Navigation and screen name.
2. To search for karyotype information, enter the **Accession Number** and/or **Client Number**, and then click the Search button (see #4).
3. Selecting a value in the **Filtered by** field allows you to filter all karyotypes in the grid by status (All, Reviewed, Not Reviewed, Special Attention).

Code Karyotypes (continued)

FIGURE 2

Monitor >> Code Karyotypes

Accession Number: 001-01-001/P-2003-11

Client Number: 909

Filtered by: 4 Select Search Clear

Lab Specimen Number: 23116

Lab Name: Kaiser North Cytogenetic

Karyotype: 46,XY,t(6;14)(q27;q22)pat

Comments:

Code 1: Select

Code 2: Select

Code 3: Select

Code 4: Select

Save Cancel

Special ATN:	Select:	Reviewed Type	Sources	Karyo Text	Code 1	Code 2	Code 3	Code 4	More Codes
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	PSR	46,XY,t(6;14)(q27;q22)pat	TransYes	TransRobUnbal			<input type="checkbox"/>

4092::msc
01/10/2003
00:00:00.000

6 Update

4. Buttons:

- Click the **Search** button to search for karyotypes associated with a specified Accession Number and/or Client Number.
 - Click the **Clear** button to clear the search criteria specified in the **Filtered by** dropdown.
- Karyotype grid** - any karyotypes matching the case to which the Accession Number belongs to, Client Number and filter selection are displayed in the karyotypes grid.
 - To edit the coding for a karyotype, click the radio button in the **Select** column of the karyotypes grid, then click the **Update** button. Additional fields will become available for editing the karyotype codes.
 - The **More Codes** field is a read-only checkbox that will be automatically checked if more than 4 codes exist for a karyotype. These additional codes are not visible in SIS.

Code Karyotypes (continued)

FIGURE 3

GDB-SIS

Monitor >> Code Karyotypes

Accession Number: 001-01-001/P-2003-11

Client Number: 909

Filtered by: Select [Search] [Clear]

Lab Specimen Number: 23116

Lab Name: Kaiser North Cytogenetic

Karyotype: 46,XY,t(6;14)(q27;q22)pat

Comments:

Code 1: Select

Code 2: Select

Code 3: Select

Code 4: Select

[Save] [Cancel]

Special ATN:	Select:	Reviewed Type	Sources	Karyo Text	Code 1	Code 2	Code 3	Code 4	More Codes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PSR	46,XY,t(6;14)(q27;q22)pat	TransYes	TransRobUnbal			<input type="checkbox"/>

4092::msc
01/10/2003
00:00:00.000

1

[Update]

8. Laboratory information is displayed for the selected karyotype.
9. View and modify karyotype and code information in the fields provided. Select from the following values:

Tri2 through Tri22	Turners	Klinefelters
XYX	SexOther	TripleX
Triploidy	Monosomy	Polyploidy
Mosaicism	TransYes	TransDerivative
TransReciprocal	TransRobBal	TransRobUnbal
Additions	Deletions	Duplications
Insertions	Inversions	Rings
Fragile	Dicentric	IsoChrom
Markers		

Code Karyotypes (continued)

FIGURE 4

Monitor >> Code Karyotypes

Accession Number: 001-01-001/P-2003-11

Client Number: 909

Filtered by: Select

Search Clear

Lab Specimen Number: 23116

Lab Name: Kaiser North Cytogenetic

Karyotype: 46,XY,t(6;14)(q27;q22)pat

Comments:

Code 1: Select

Code 2: Select

Code 3: Select

Code 4: Select

Save Cancel

Special ATN:	Select:	Reviewed	Type	Sources	Karyo Text	Code 1	Code 2	Code 3	Code 4	More Codes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PSR		46,XY,t(6;14)(q27;q22)pat	TransYes	TransRobUnbal			<input type="checkbox"/>

4092::msc
01/10/2003
00:00:00.000

1

Update

10. Buttons:

- Click the **Save** button to save the changes you made to the karyotype code information. SIS will then return you to the screen view described in **FIGURE 1**. Any changes made to karyotype codes on this screen will generate an alert to the PDES Registry staff.
 - Click the **Cancel** button to discard any unsaved karyotype code changes you made. SIS will then return you to the screen view described in **FIGURE 1**.
- Click the **Special ATN** checkbox to flag the karyotype code for review by a PDES Registry staff member.
 - Click the **Reviewed** checkbox once you are satisfied with the karyotype information you have reviewed and/or edited.

Conditions for PDC Approval

Entity >> Entity Profile >> Cond for PDC Approval

The **Cond for PDC Approval** screen is used to view, create and update conditions a Prenatal Diagnosis Center (PDC) must meet in order to be approved or maintain approval by the GDB. Conditions for PDC approval are only relevant for “PDC-type” entities; however SIS will allow you to enter conditions for approval for any entity type.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Entity Search
Entity Profile

Entity » Entity Profile » Cond for PDC Approval

View Address	Entity Relation	Maintain CEU's	License	Certification
Entity Services	Cond for PDC Approval			

Entity ID: 4275 Entity Code: 111
Entity Name: Comp PDC

Existing Conditions for PDC Approval

Start Date	End Date	Condition	Changes	Approval Status
<input type="radio"/> 12-13-2004	12-14-2004	Condition	Changes	Approved

Add Edit

- Information about the case is displayed in a read-only format. To update this information you must use the **Entity Profile** screen.
- The **Existing Conditions for PDC Approval** grid displays approval conditions that have already been entered.
- Buttons:**
 - Click the radio button next to the condition and then click the **Edit** button to make changes to the selected condition (see **FIGURE 2** below).
 - Click the **Add** button to add a new condition for the selected entity (see **FIGURE 2** below).

Conditions for PDC Approval (continued)

FIGURE 2

Entity » Entity Profile » Cond for PDC Approval

View Address	Entity Relation	Maintain CEU's	License	Certification
Entity Services	Cond for PDC Approval			

Entity ID: 4275 Entity Code: 111
Entity Name: Comp PDC

Enter/Edit Conditions for PDC Approval

* Start Date: 12-13-2004
* End Date: 12-14-2004
* Condition: **4** Condition
* Changes: Changes
* Approval Status: Approved

Save Clear Cancel **5**

Existing Conditions for PDC Approval

Start Date	End Date	Condition	Changes	Approval Status
12-13-2004	12-14-2004	Condition	Changes	Approved

4. Update the existing condition information. **Start Date**, **End Date**, **Condition**, **Changes** and **Approval Status** are required fields. Once you have saved a new condition the **Start Date** will be a read-only field and will not be editable. Please note that dates cannot overlap. If you are adding a new approval condition you will have to edit the existing conditions so that the dates do not overlap.

5. **Buttons:**

- a. Click the **Save** button to save the updated condition record with the information you entered in the fields above.
- b. Click the **Clear** button to clear the information you have entered discarding any unsaved data.
- c. Click the **Cancel** button to discard any unsaved condition information you have entered and return to the previous screen.

Note: If you click the Add button instead of the Edit button, the fields will be empty. After clicking Save, a row will be added to the Existing Conditions for PDC Approval grid.

Consolidate Registry

Data Intake >> View List Of CCR >> Consolidate Registry

The **Consolidate Registry** screen allows you to view registry data that is collected from various sources, and create one consolidated registry record for a selected client in SIS. If the Registry Monitor identifies the registry data as “Reliable” in SIS, then a registry record will be created in the NTD and/or Chromosomal Registries once the Consolidated Registry information has been saved.

In the Header Part of Consolidated screen, we will display all the valid specimens in the case for the Post PEII cases along with Client Name and Date of Birth. For Pre PEII cases, we will only display one valid specimen along with Client Name and Date of Birth.

In the CCR and Consolidated registry details section all the valid Accession Numbers associated to the case will be displayed.

A New PSR drop down is added newly to this screen to list all the PSR Ids associated to the selected Accession Number. Selecting a PSR Id and clicking on the ‘Go’ button will load that record in the PSR column of the grid.

The “cdspec” value in the consolidated column will identify whether the Karyotype specimen is CVS or Amnio.

Consolidate Registry (continued)

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search

Id Search

View Client Profile

1st T TRF Data Entry (PNS)

2nd T TRF Data Entry (PNS)

Case Summary (PNS)

TRF Data Entry (NBS)

Case Summary (NBS)

Lab Cofc

View Edit Log

Resolve Duplicates

Maint Client Relation

Upload CCR

Add Test Results

Audit Data Entry

Biotinidase Expected List

Expected Recall (NBS)

View List of CCR

Case Resolution

MPKU Registry Search

Metabolic Service Report

Reassign MC

Cystic Fibrosis Service Report

Reassign CF

MS/MS Ref Lab Exptd

Enter Other Mutation Test Results

View Holding Tank Records

Expected Phe Monitoring

MC Annual Patient Summary

CFC Annual Patient Summary

View CFF File Records

Search for 1st T Specimen

Data Intake » View List of CCR » Consolidate Registry

Client Name: Ellis, Joann Date of Birth: 12/7/1982

Accession Number: 179-59-383/A -2008-72

222-55-444/P -2008-72

CCR Details:

Baby Name: Fetus Letter Code: A

Baby Gender: Pregnancy Id: 2

Baby DOB: Accn. No.: 179-59-383/A -2008-72

222-55-444/P -2008-72

Consolidated Registry Details:

Baby Name: Fetus Letter Code: A

Baby Gender: Pregnancy Id: 2

Baby DOB: Accn. No.: 179-59-383/A -2008-72

222-55-444/P -2008-72

Search Results

Data Element	Consolidation	PSR	Outcome CCR	Vital Statistics	Cytogenetic Birth Defects	Data Element
cFacCode	(1170003)03a	(1170003) Prenatal Diagnosis of Northern Calif.	(1170003)03a			cFacCode
mLMP	08/05/2008		08/05/2008			mLMP
mEDC	05/12/2009	05/12/2019	05/12/2009			mEDC
mAgeEDC	26		26			mAgeEDC
fCount	1	1	1			fCount
fAffect	1		1			fAffect
pStatus	(1)Continuing Pregnancy	(1)Continuing Pregnancy	(1)Continuing Pregnancy			pStatus
pStatOt						pStatOt
pStDate	08/15/2008		08/15/2008			pStDate
pStGawk						pStGawk
pStGady						pStGady
pGAmthd	(U)Ultrasound		(U)Ultrasound			pGAmthd
iDOB						iDOB
iBwtGrms	300		300			iBwtGrms
iBwtLbs						iBwtLbs

- Header** section displays the Client Name, Date of Birth and all the valid Accession numbers associated to the selected case.
- CCR Details** section displays information about CCR loaded in the search results grid.
- Consolidated Registry Details** section displays information about the current consolidated record loaded in the search results grid.
- Search Results** grid displays the registry data available from each source. Each cell containing data is a link. Clicking the link will populate the **Consolidation** column for that row, with the data values from the selected source column. For example, clicking "1" from the CCR column will display a "1" in the Consolidation column for the "fCount" row. Clicking on the header of a source column will populate the entire consolidation column with the values from the selected source column.

Consolidate Registry (continued)

FIGURE 2

iDOD							iDOD
cdKaryo	47,XY,+21	47,XY,+21		47,XY,+21[4]			cdKaryo
cdKaryoCls	(20)Tri21			(20)Tri21			cdKaryoCls
cdRearr	(4)Unknown			(4)Unknown			cdRearr
cdSpecNbr							cdSpecNbr
cdSpecTyp	(1)Amniotic Fluid	(2)Chorionic Villus Sample		(2)Chorionic Villus Sample (CVS)			cdSpecTyp
cdPostSpec							cdPostSpec
cdSmpldt	08/13/2008						cdSmpldt
cdSmplGAwk							cdSmplGAwk
cdSmplGAdy							cdSmplGAdy
cdGAmthd	(L)LMP			(L)LMP			cdGAmthd
cdRsnSmpl	(4)Other			(4)Other			cdRsnSmpl
cdFnldt							cdFnldt
ndDX							ndDX
ndSB							ndSB
ndHydro							ndHydro
ndSynd							ndSynd
ndOthAbstxt							ndOthAbstxt
ndUS	Y	N					ndUS
ndUSdt	08/13/2008						ndUSdt
ndUSFac	(1170003)(0) Prenatal Diagnosis of Northern Calif.	(1170003) Prenatal Diagnosis of Northern Calif.					ndUSFac
ndUSGAwk							ndUSGAwk
ndUSGAdy							ndUSGAdy
ndAmnio	Y	N					ndAmnio
ndamdt	08/13/2008						ndamdt
ndamFac	(1170003)(0) Prenatal Diagnosis of Northern Calif.						ndamFac
ndamGAwk							ndamGAwk
ndamGAdy							ndamGAdy
ndAfAFP	1.47						ndAfAFP
ndAfACHE	(1)Positive						ndAfACHE
ndPostDX							ndPostDX
ndDXdt							ndDXdt
ndAbConf							ndAbConf
ndCnfMthd							ndCnfMthd
ndCnfSrc	(4)Clinician Notes			(4)Clinician Notes			ndCnfSrc
*Registry	(32)Chromosome	(32)Chromosomal		(32)Chromosome			*Registry

Select PSR: 179-59-383/A -2008-72 -- 278278 Go → 5

Select Consolidated Registry: 200137694 Go → 6

*Reliability: Certain → 7

Comments: → 8

9

Save Save With Header Reset

- Select PSR** drop down section displays all the PSR Ids of the PSR's available for the client. This drop down will be visible only when PSR's is present for a client.
- Select Consolidated Registry** drop down section displays all the registry Ids associated with the client. This drop down will be visible only when registry Ids are present for a particular client.
- Reliability** of the registry data is a required field. The Registry Monitor must choose from the following Reliability options prior to Saving the Consolidated Registry form: Certain, Probable, Tentative, Not a Case.

Consolidate Registry (continued)

8. **Comments** is a free form field. You may enter any comments for the consolidated CCR.
9. **Buttons:**
 - a. **Save** button creates a registry record in the NTD and/or Chromosomal Registry when "Certain" is selected for the **Reliability** field. If one of the other three reliability values is selected, the consolidated data is saved in SIS, but no registry record is created.
 - b. **Save with Header** button will save the data in the consolidated column along with the header details. CCR header details are copied to the Consolidated registry details.
 - c. **Reset** button reloads the screen and clears the information in the **Consolidated** column

Create New User

Utilities >> View All Users >> Create New User

Entity >> Entity Profile >> Create New User

The **Create New User** screen is used to create a new user in SIS and to update information about a user who has already been created, including the user's Sign In ID, Role, Status, and Security Group membership. To create a new user record, use the Entity Relation screen and click the **Create New User** button.

FIGURE 1

1. Navigation and screen name.
2. **Sign In ID** is a required field denoted by the (*)
3. **Role** is a required field denoted by the (*)
4. **Status** ("PNS", "NBS" or "Both") is a required field denoted by the (*)
5. You can reset a user's password (reverts to the same as the Sign In ID) by clicking the **Reset Password** checkbox.
6. Group section indicates the SIS security groups to which the user belongs. Membership in a group is indicated by a checkmark in the box next to the group name. You can add or delete group membership to one or more group from this screen.

Create New User (continued)

FIGURE 2

4092::msc
01/18/2003
00:00:00.000

<input type="checkbox"/> Follow - up Center -PDC - Invoice Liaison	<input type="checkbox"/> Follow - up Center -PDC - Appt. Scheduler	<input type="checkbox"/> Follow - Up Center - PDC - Cytogenetic Laboratory
<input type="checkbox"/> Follow - Up Center - PDC - Quarterly Report Contact	<input type="checkbox"/> Follow - up Center -PDC - PDC Director	<input type="checkbox"/> Follow - up Center -PDC - PSR Contact (formerly PDPR Contact)
<input type="checkbox"/> GDL - Administrator	<input type="checkbox"/> GDL - Chemist I	<input type="checkbox"/> GDL - Chemist II
<input type="checkbox"/> GDL - Data Clerk	<input type="checkbox"/> GDL - Lab Assistant	<input type="checkbox"/> GDL - QA Chemist
<input type="checkbox"/> GDL - QA reviewer	<input type="checkbox"/> GDL- QA releaser	<input type="checkbox"/> GDL- Senior Staff
<input type="checkbox"/> GDB IT - Administrator	<input type="checkbox"/> IT - Analyst	<input type="checkbox"/> IT - Staff
<input type="checkbox"/> NAPS Lab - Administrator	<input type="checkbox"/> NAPS Lab - Staff	<input type="checkbox"/> NAPS Lab - Analyst
<input type="checkbox"/> GDB NBS - Administrator	<input type="checkbox"/> GDB NBS - Monitor	<input type="checkbox"/> NBS - Staff
<input type="checkbox"/> NBS - Follow up staff	<input type="checkbox"/> GDB NBS - Staff - form monitor	<input type="checkbox"/> NBS - Staff - LTR Clerk
<input type="checkbox"/> NBS- Registry - MPKU	<input type="checkbox"/> NBS - County Birth Registrar	<input type="checkbox"/> GDB PDES - Administrator
<input type="checkbox"/> PDES - Analyst	<input type="checkbox"/> PDES - Staff	<input type="checkbox"/> PDES - Staff - Extended Survey
<input type="checkbox"/> PDES - Staff - Outcome	<input type="checkbox"/> PDES - Staff - Quarterly Reports	<input type="checkbox"/> PDES - Staff - Registry - CF
<input type="checkbox"/> GDB PDES - Staff - Registry - Chromosome	<input type="checkbox"/> PDES - Staff - Registry - Endocrine	<input type="checkbox"/> PDES - Staff - Registry - Galactosemia
<input type="checkbox"/> PDES - Staff - Registry - Hemoglobin	<input type="checkbox"/> PDES - Staff - Registry - MS/MS	<input type="checkbox"/> GDB PDES - Staff - Registry - NTD
<input type="checkbox"/> PDES - Staff - Registry - PKU	<input type="checkbox"/> PDES - Staff - RH Disease	<input type="checkbox"/> GDB OSS - Entity - Administrator
<input type="checkbox"/> OSS - Entity - User	<input type="checkbox"/> OSS - AR	<input type="checkbox"/> GDB PNS - Administrator/Monitor
<input type="checkbox"/> PNS - Staff	<input type="checkbox"/> PNS - Staff - LTR Clerk	<input checked="" type="checkbox"/> GDB QA - Administrator
<input checked="" type="checkbox"/> QA - Adverse Outcomes	<input checked="" type="checkbox"/> GDB QA - Cytogenetic Monitor	<input checked="" type="checkbox"/> QA - Entity
<input checked="" type="checkbox"/> GDB QA - Monitor	<input checked="" type="checkbox"/> QA - Staff	<input type="checkbox"/> GDB SuperUser
<input type="checkbox"/> PDES - Staff - Clinical Review - MS/MS		

7

Save Back

7. Buttons:

- Save** updates an existing user profile.
- Back** returns the user to the View All Users screen discarding any changes that have not been saved in the Create New User screen.

Note: To update an existing user, navigate to the **View All Users** screen, click the radio button next to a user record and then click the **Update** button.

Cystic Fibrosis Service Report

Data Intake >> Cystic Fibrosis Service Report

The Cystic Fibrosis Service Report screen will be used to capture services provided at the Cystic Fibrosis Centers up until the point at which the child is diagnosed. All further follow-up will then be captured in the Annual Patient Summary screen. A 3rd level link to Case Notes is available in this screen allowing entry of additional information on the patient encounter.

FIGURE 1

GDB-SIS

Data Intake >> Cystic Fibrosis Service Report

Client/Case Search
Id Search
View Client Profile
Specimen History
TRF Data Entry (NBS)
Case Summary (NBS)
Lab Cofc
View Edit Log
Resolve Duplicates
Maint Client Relation
Addl Test Results
Audit Data Entry
Biotinidase Expected List
Expected Recall (NBS)
Case Resolution
MPKU Registry Search
Metabolic Service Report
Cystic Fibrosis Service Report
Reassign CF
Reassign MC
Enter Other Mutation Test Results
MS/MS Ref Lab Exptd
MC Annual Patient Summary
Expected Phe Monitoring
CFC Annual Patient Summary
View CFF File Records

gaffney::N099
04/12/2007
08:48:29.750

Data Intake >> Cystic Fibrosis Service Report

Case Summary (NBS)
Re-assign CCC
Case Audit Results SCCC

Adequacy Status (NBS)
Tracking Events
Link NBS Accn Numbers

Case Notes
Appointments

Link Accn Numbers
Services History

Conf Test Results
Link Client to Entity

Client Name: LILY, GIRL
Accession Number: 274-81-036/21-2006-22
Date of Birth: 9/25/2006

Cystic Fibrosis Services Report

Select	Date of Contact	Contact Type	Contact Mode	Case Status	CFTR Mutation	Entered Date	Entered By
<input type="radio"/>	04/01/2007	Physician consultation	Face to Face	Pending		04/12/2007	Gaffney Leslie
<input type="radio"/>	04/04/2007	Education session	E-mail	Resolved - Suspect Cystic Fibrosis		04/12/2007	Gaffney Leslie

New Update View

1. Displays client and case information in read-only format.
2. Lists all CFSTRs that have been completed for the client in the grid. Use the **Select** radio button to indicate the specific report to be displayed.
3. **Buttons:**
 - a. **New:** Displays a new, blank CFSTR form for the patient.
 - b. **Update:** Displays the CFSTR selected in the grid in update mode.
 - c. **View:** Displays the CFSTR selected in the grid in read-only mode

Cystic Fibrosis Service Report (continued)

FIGURE 2

General Information ④

Gender: Female
 Race/Ethnicity: White ⑤
 Cystic Fibrosis Center Name: CF Center - Richmond
 Cystic Fibrosis Center Code: CF01

Do not complete the following line until a parent request has been made.
 #Cystic Fibrosis Foundation Patient ID: Or Not enrolled in Patient Registry ☐ ⑥

*Case Status: Pending Other (Specify) ⑦

CFTR Mutations: Call GDB if genotype is unavailable or incorrect. ⑦
 Meconium ileus after birth: Select ⑧
 Is there a family history of CF? Select ⑧
 Was CF diagnosis made on the basis of symptoms? Select ⑧
 Did mother or couple receive CF mutation testing? Select ⑧

	Race/Ethnicity	CFTR Mutation 1	CFTR Mutation 2	Height	Units
Mother	Select				Select
Father	Select				Select

*Date of Contact: 04 - 01 - 2007 ⑨
 *Clinical Encounter Type: Physician consultation Other (Specify) ⑩
 *Contact Mode: Face to Face

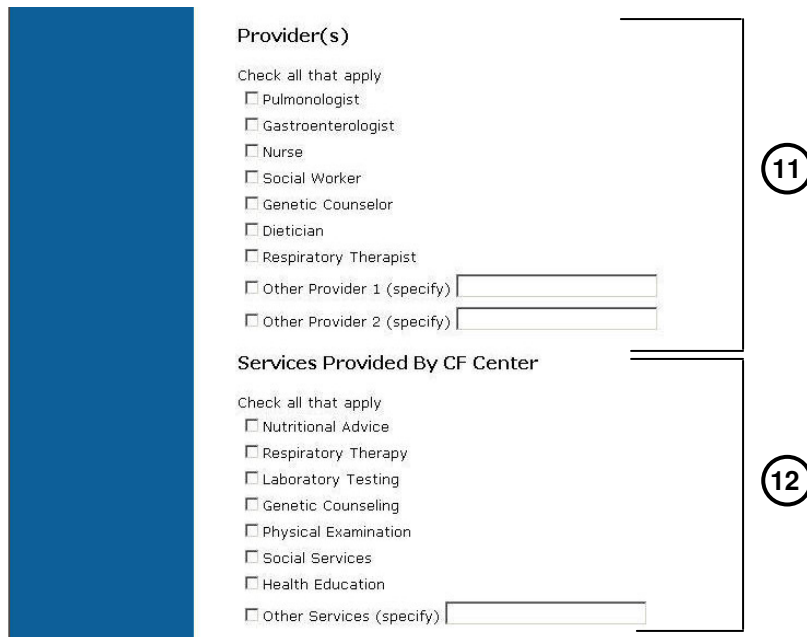
4. **General Information:** Displays and captures general information about the patient including demographic information, family history of CF and high-level information regarding the contact with the patient.
5. This read-only area displays client information and the CF center completing the report.
6. Either enter the CFF Patient ID for the client, or check that the child's guardian requested that the child not be enrolled in Patient Registry. Enter the **Case Status**, unless the field has been disabled because the case is in Update or View mode.
7. Displays a list of the mutations that the baby screened positive for in the **CFTR Mutations** field.
8. Enter details about the baby's birth.
 - a. Select whether the baby had **Meconium Ileus after birth**.
 - b. Select whether the family has a history of CF.
 - c. Select whether the CF diagnosis was made based on the symptoms that the child presented.
9. Select whether the baby's mother or father were tested for CF mutations. If they were, complete the grid that follows: (Note that these values will default from the last CFSR completed for the patient)
 - a. Select primary **Race/Ethnicity** of the child's parent from the dropdown list in the grid.
 - b. Enter the mutations that the parent tested positive for in the **CFTR Mutation 1** and **Mutation 2** fields.

Cystic Fibrosis Service Report (continued)

- c. Enter the parent's **Height** and select the **Unit** of measurement from the dropdown list in the grid.
- 10. Enter details of the contact with the patient that is being documented in the CFSR. These are required fields. Required fields are denoted by (*).
 - a. Enter the **Date of Contact**. If desired, use the calendar icon to select the date.
 - b. Select the type of encounter from the **Clinical Encounter Type** dropdown box. If the encounter was not one of those listed in the drop down list, select **Other**, and specify the type of encounter in the blank box that follows.
 - c. Select the **Contact Mode** from the dropdown box.

Cystic Fibrosis Service Report (continued)

FIGURE 3



The screenshot shows a form with two main sections. The first section, labeled 'Provider(s)', includes a 'Check all that apply' instruction and a list of checkboxes for various providers: Pulmonologist, Gastroenterologist, Nurse, Social Worker, Genetic Counselor, Dietician, and Respiratory Therapist. There are also two 'Other Provider' checkboxes with text input fields for specification. The second section, labeled 'Services Provided By CF Center', also includes a 'Check all that apply' instruction and a list of checkboxes for various services: Nutritional Advice, Respiratory Therapy, Laboratory Testing, Genetic Counseling, Physical Examination, Social Services, Health Education, and Other Services. There is a text input field for specifying other services. Circled numbers 11 and 12 are placed to the right of the form, corresponding to the two sections.

Provider(s)

Check all that apply

☐ Pulmonologist

☐ Gastroenterologist

☐ Nurse

☐ Social Worker

☐ Genetic Counselor

☐ Dietician

☐ Respiratory Therapist

☐ Other Provider 1 (specify)

☐ Other Provider 2 (specify)

Services Provided By CF Center

Check all that apply

☐ Nutritional Advice

☐ Respiratory Therapy

☐ Laboratory Testing

☐ Genetic Counseling

☐ Physical Examination

☐ Social Services

☐ Health Education

☐ Other Services (specify)

11. Check the types of providers who provided services to the patient. If providers other than those listed on the screen conducted services, check the first available **Other Provider** checkbox, and specify the type of provider in the blank box that follows.
12. Check the services that were provided to the patient. If services other than those listed on the screen were provided, check the **Other Services** checkbox, and specify the details of the service in the blank box that follows.

Cystic Fibrosis Service Report (continued)

FIGURE 4

The screenshot shows a portion of a web-based form for a Cystic Fibrosis Service Report. A blue vertical bar on the left side of the form contains three white circles with black numbers: 13, 14, and 15, indicating the sections being described in the instructions.

Section 13: Anthropometric Measures

Weight: Units:
 Height/Length:
 Head Circumference:

Section 14: Pulmonary Function Tests (PFTs)

☐ Not Done
☐ Unable to perform reliable test

Measure
 FVC (Liters)
 FEV 1 (Liters)

Section 15: Tests Ordered and Results

Respiratory Microbiology:
 Type of Culture:
 Culture Result (Check all that apply)
☐ No growth/sterile culture
☐ Normal flora
☐ Aspergillus (any species)
☐ Burkholderia cepacia
☐ Haemophilus influenzae (any species)
☐ MRSA (methicillin resistant Staph aureus)
☐ Pseudomonas aeruginosa (mucoid)
☐ Pseudomonas aeruginosa (non-mucoid)
☐ Pseudomonas aeruginosa (unknown)
☐ Staphylococcus aureus
☐ Stenotrophomonas (Xamhomonas) maltophilia
☐ Other pathogen (specify)

Other Tests:

Check all that apply	Result (call GDB with Genotype result)
<input type="checkbox"/> Mutation Testing	<input type="text" value="Select"/>
<input type="checkbox"/> Albumin	<input type="text" value="Select"/>
<input type="checkbox"/> Hemoglobin	<input type="text"/>
<input type="checkbox"/> Serum Creatinine (mg/dL)	<input type="text"/>
<input type="checkbox"/> Stool Trypsin	<input type="text" value="Select"/>
<input type="checkbox"/> Fecal Fat	<input type="text" value="Select"/>
<input type="checkbox"/> Other Test (specify)	<input type="text"/>

13. Enter the **Anthropometric Measures** for the patient.
 - a. Enter the child's **Weight** and select the **Unit** of measurement from the drop down list.
 - b. Enter the child's **Height/Length** and select the **Unit** of measurement from the drop down list.
 - c. Enter the child's **Head Circumference** and select the **Unit** of measurement from the drop down list.
14. Enter the details of **Pulmonary Function Test(s)** conducted on the patient.
 - a. If PFTs were not done, check whether they were not provided because they were not done, or because they could not be done reliably.
 - b. If PFTs were done, enter the **FVC** and **FEV 1** values in the blank boxes.
15. **Tests Ordered and Results:** Captures all of the tests that were ordered on the patient and their results.

Cystic Fibrosis Service Report (continued)

- a. If a culture was taken, select the **Type of Culture** that was taken from the dropdown list. Check all of the results of the culture. If results other than those listed on the screen were identified, check the **Other pathogen** checkbox, and specify the type of pathogen in the blank box that follows.
- b. If other tests were taken, check all of the tests that were taken and enter or select the appropriate test results. If tests other than those listed on the screen were taken, check the **Other Test** checkbox, and specify the type of test in the blank box that follows.

Cystic Fibrosis Service Report (continued)

FIGURE 5

akhathur::CF02
 02/26/2007
 14:29:16.313

Treatment Initiated or Changed 16

Enzymes and Vitamin Supplements:

☐ Pancreatic enzymes ☐ Supplemental tube feeding

☐ Vitamins ☐ Oral nutritional supplements

Antacids:

☐ H-2 blockers

☐ Proton Pump

Airway/Nasal Care:

☐ Lung percussion therapy ☐ Bronchodilator

☐ Pulmozyme ☐ Saline

☐ Inhaled corticosteroid

Anti-inflammatory medications:

☐ Azithromycin

☐ Prednisone

Antibiotics:

☐ Oral antibiotic therapy (specify)

☐ IV antibiotics (home)

☐ IV antibiotics (hospital)

☐ Aerosolized TOBI

Other

☐ Oxygen therapy (hospital) ☐ Other Treatment 1 (specify)

☐ Oxygen therapy (home) ☐ Other Treatment 2 (specify)

☐ Urodeoxycholic Acid ☐ Other Treatment 3 (specify)

☐ Stool softeners ☐ Other Treatment 4 (specify)

☐ Other Treatment 5 (specify)

16. **Treatment Initiated or Changed:** Captures all of the treatments that have been prescribed to the patient.
- a. Check all **Enzymes and Vitamin Supplements** that were prescribed to the patient.
 - b. Check all **Antacids** that were prescribed to the patient.
 - c. Check all **Airway/Nasal Care** treatments that were prescribed to the patient.
 - d. Check all **Anti-inflammatory medications** that were prescribed to the patient.
 - e. Check all **Antibiotics** that were prescribed to the patient.
 - f. Check all **Other** treatments that were prescribed to the patient. If treatments other than those listed on the screen were performed, check the first available **Other Treatment** checkbox, and specify the type of treatment in the blank box that follows.

Cystic Fibrosis Service Report (continued)

FIGURE 6

Health Problems

☐ Asymptomatic

Growth Related:

☐ Failure to thrive/Malnutrition

☐ Poor weight gain

☐ Poor rate of growth (height)

Respiratory:

☐ Poor lung function

☐ Respiratory infections

☐ Nasal polyps/sinus disease

Digestive:

☐ Steatorrhea/Abnormal Stools/Malabsorption

☐ Rectal prolapse

☐ Intestinal blockage (after passage of Meconium)

☐ Acid reflux

Other:

☐ Electrolyte imbalance

☐ Vision problems

☐ Edema

☐ Hearing loss

☐ CF-related diabetes/Glucose abnormalities

☐ Specify, if other (1)

☐ Bone disease

☐ Specify, if other (2)

☐ Liver disease

☐ Death: Check if Patient Died

Date of Death: --

Was death related to a complication of Cystic Fibrosis?

Causes of death:

Global Health Assessment: Select the number that describes the overall health status of the child - compared to a typical child without cystic fibrosis -

17. **Health Problems:** Captures all health problems that were experienced by the patient.
 - a. If the patient had no health problems, check the **Asymptomatic** checkbox.
 - b. Check all **Growth Related** health problems experienced by the patient.
 - c. Check all **Respiratory** health problems experienced by the patient.
 - d. Check all **Digestive** health problems experienced by the patient.
 - e. Check all **Other** health problems experienced by the patient. If health problems other than those listed on the screen were experienced by the patient, check the first available **Other** checkbox, and specify the type of problem in the blank box that follows.
18. If the patient has died, check the **Death** checkbox, and indicate the details of the death.
 - a. Enter the **Date of Death**. If desired, use the date calendar.
 - b. Select whether the death was related to a complication of CF.
 - c. Enter the **Causes of death**.
19. Select a number from the **Global Health Assessment** dropdown box that indicates overall health status of the child when compared to a child without cystic fibrosis.

Cystic Fibrosis Service Report (continued)

20. **Buttons:**

- a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated CFSR appears in the **Cystic Fibrosis Services Report** grid that is displayed.
- b. **Cancel:** Closes the detailed form without saving the changes.

Disclosure

When you log into SIS for the first time, you will be asked to read and accept an Oath of Confidentiality. You will not be able to access SIS if you do not accept.

GDB-SIS

OATH OF CONFIDENTIALITY

1) I have been informed and understand that, in the course of my employment with the Genetic Disease Branch, I will be handling documents and data provided to the Department of Health Services under assurance of confidentiality to the clients to which the documents and data pertain, and to their health care providers as expressed in the privacy policies published by the Genetic Disease Branch.

2) I agree that I shall not discuss, share or otherwise communicate to any person any confidential information including the individual details or individual case records or reports without the prior specific written permission of the Chief of the Genetic Disease Branch and shall be bound by the privacy policies of the Genetic Disease Branch and applicable state and federal law.

3) I will keep all confidential material in my possession in a secure manner and not remove it from the work site.

4) I will not discard any confidential material, but will dispose of it by shredding.

5) I have been given access to copies of:

- a) California Government Code Section 6250, et. seq., (California Public Records Act)
- b) California Civil Code, Division 3, Part 4, Title 1.8, Sections 1798-1798.65.(Information Practices Act of 1977)
- c) California Health and Safety Code Division 104, Part 5, Chapter 1.(Hereditary Disorder Act)
- d) Genetic Disease Branch Privacy Policy

☒ Accept ☐ Don't Accept

Submit Cancel

1. Read the Oath of Confidentiality and choose either "Accept" or "Don't Accept" using the radio buttons.
2. **Buttons:**
 - a. **Submit** button will send your response to SIS, and allow you to access SIS if you have selected "Accept".
 - b. **Cancel** will return you to the SIS login homepage.

Enter Case Resolution – Non-Screened

Data Intake >> Case Resolution

This screen enables users to enter diagnosis information for a non-screened client. This allows non-screened clients to be entered into SIS so that these clients can be submitted to the Registry by the PDES Monitor.

The portion of the screen related to test resolution and the Test Determination grid will not appear for these cases. Disease diagnosis can be entered, but it will not be associated with any testing.

FIGURE 1

1. **CFTR Final Mutation Result:** Cystic Fibrosis test result mutations can be manually entered here.
2. **Disease:** Select the checkbox that is applicable.
3. **ASMT Code:** Select a code from dropdown box:
 - A = Screened and identified through the NBS program.
 - B = Born in California, but not identified through the NBS program (for a variety of reasons)
 - C = Born outside of California.
 - D = Screened through California and NBS and missed.

Enter Case Resolution - Non-Screened (continued)

FIGURE 2

Hospital Code:

Birth Weight (Grams):

Approximate Date of Diagnosis: 12 -28 -2006

Age at Diagnosis (Days): 22

Seen by Specialist? Yes

Date First Seen by Specialist: - -

Followed by a CCS Center? Select

Name of Center:

Age at Visit (Days):

Date Treatment Started: 01 -01 -2007

Age at Treatment Started (Days): 26

Explanation of Delays: Select

Comments regarding Delay:

Primary Care Physician Details **5**

Name of Primary Care Physician:

Address Of Primary Care Physician:

Phone: - -

Specialist Details **6**

Name of Specialist: Kaiser Permanente Med

Address Of Specialist:

Phone: - -

4. Information should be filled in using blank boxes, dropdown boxes and calendar icons.
5. **Primary Care Physician Details:** Enter name of the Primary Care Physician (PCP) if known, or use **Search** button to find the physician. Enter the address and phone number of primary care physician.
6. **Specialist Details:** Enter name of specialist if known, or use **Search** button to find the specialist. Enter the address and phone number of specialist.

Enter Case Resolution - Non-Screened (continued)

FIGURE 3

7 Reliability
Reliability:
General Comments:

Certain
This is a confirmed case.

8 History

Date	Test	Disorders
03/23/2007		Cystic Fibrosis

mroberson:001
03/23/2007
10:20:46.670

9

Save Cancel Submit to Registry

7. **Reliability:** The Registry Monitor will select a value from a dropdown box and enter any comments in the blank box provided.

Reliability status is used by the registry monitor to mark the status of a registry record. It could be one of:

- Certain– the case is a confirmed registry case
- Tentative or Probable – the case is marked as a tentative registry case which means the registry monitor is not sure if it qualifies to a registry case
- Marked for Deletion – the record is marked for deletion and is not counted as a registry case
- Not a case – case was submitted to registry and it then turns out to be not a registry case.

Based on these statuses, the cases appear or not appear on specific registry reports e.g. the Marked for Deletion ones do not appear on any report.

8. **History:** The history of all the resolutions for a client will be displayed at the bottom of each screen. By clicking on the **Date** hyperlink in the **History** grid, the corresponding Diagnosed Case (DC) record will appear on the screen.
9. **Buttons:**
- Save:** Saves all changes.
 - Cancel:** Cancels current operation without saving.
 - Submit to Registry:** Clicking the button enters the case into the registry. Only the PDES Registry monitor will be able to submit the case to the registry.

Enter Case Resolution – Screened

Data Intake >> Case Resolution

This screen allows a user to enter the resolution for a diagnosed case which will allow it to be added to the client registry. The user is able to capture data for screened as well as non-screened clients.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Case Resolution

Client Name: RANGANATHAN Date of Birth: 10/17/2006
 Accession Number: 296-64-487/21-2006-21

Test Determinations

Select	Test	Test Interpretation	Resolution
<input type="radio"/>	BD	BD Negative	
<input type="radio"/>	CAH	CAH Negative	
<input checked="" type="radio"/>	CF	CFTR Mutation Panel Positive	
<input type="radio"/>	HEMOGLOBIN	No Disease	
<input type="radio"/>	MSMS	Out-of-range	
<input type="radio"/>	TRA	GAL Negative	
<input type="radio"/>	TSH	Hypothyroidism Negative	

Test Type: CF

CFTR Final Mutation Result: delF508 delF311

Test Resolution: Disorder

Comment:

1. For a screened client, the user will be presented with all the tests in the **Test Determinations** grid. After this test has been selected, the disease diagnosis portion of the screen (mutation "test type") will be enabled and the user will be able to enter the diagnosis associated with that test.
2. The **Test Type** area is pre-populated with testing information from the screened client.
3. The **CFTR Final Mutation Result** field will be displayed only if the CF test is selected. It will be populated based on the CFTR Mutation Analysis or CFTR DNA Sequencing test results, which will be defaulted by the system.

Enter Case Resolution – Screened

4. **Test Resolution:** A case (screened client) can be resolved using the values in this dropdown list:
- Disorder – the case is diagnosed as having a disorder
 - No Disorder – the case is diagnosed as a 'No Disorder'
 - Lost to Follow-up – the case cannot be followed up on
 - Parent Refusal – the parents of the child refused to continue with the follow-up for the patient
 - Newborn Expired – the baby expired
 - No Response from Parent – the parents did not respond despite repeated requests for follow-up
 - Other Reasons – any other reason why the follow-up could not be completed
 - Maternal Condition – the baby's mother was diagnosed with a disorder

If a case is resolved as a Disorder then the other half of the form is displayed to the user to fill in the resolution details.

Enter Case Resolution - Screened (continued)

FIGURE 2

*Disease:

☒ Cystic Fibrosis
☐ Suspect Cystic Fibrosis

*ASCMT Code:

A

Name:
 Address (Number, Street):
 Address (Apt / Suite #):
 City:
 State:
 Zip:
 County of Residence:
 Date of Birth:
 Race / Ethnicity:
 Social Security Number:
 Sex:
 Hospital Code:
 Birth Weight (Grams):
 Approximate Date of Diagnosis:
 Age at Diagnosis (Days):
 Seen by Specialist?
 Date First Seen by Specialist:
 Followed by a CCS Center?
 Name of Center:
 Age at Visit (Days):
 Date Treatment Started:
 Age at Treatment Started (Days):
 Explanation of Delays:
 Comments regarding Delay:

RANGANATHAN
 3112 La Costa St
 Apt D
 Bakersfield
 California
 93306

10/17/2006
 White

Female

R092

2620

Select

Select

Select

Select

Select

Select

Select

5. The diseases in this list will differ based on the selection in the Test Determination grid in Figure 1. The user must enter a checkmark in one of the boxes from the list.
6. **ASCMT Code:** Select a code from dropdown box:
 - A = Screened and identified through the NBS program.
 - B = Born in California, but not identified through the NBS program (for a variety of reasons)
 - C = Born outside of California.
 - D = Screened through California and NBS and missed.
7. Fill in required areas using dropdown boxes for your selection and calendar icon for dates.

Enter Case Resolution - Screened (continued)

FIGURE 3

8 Primary Care Physician Details
 Name of Primary Care Physician: [Search](#)
 Address Of Primary Care Physician:
 Phone: - - ×

9 Specialist Details
 Name of Specialist: [Search](#)
 Address Of Specialist:
 Phone: - - ×

10 Reliability
 Reliability:
 General Comments:

11 History

Date	Test	Disorders

12

gaffney::001
12/26/2007
15:39:28.800

8. **Primary Care Physician Details:** Enter name of the Primary Care Physician (PCP) if known, or use the **Search** button to find the physician. Fill in address and phone number of PCP.
9. **Specialist Details:** Enter name of specialist if known, or use **Search** button to find the specialist. Enter the address and phone number of specialist.
10. **Reliability:** The reliability status is used only by the Registry Monitor to mark the status of a registry record. It could be one of:
 - a. Certain– the case is a confirmed registry case
 - b. Tentative or Probable – the case is marked as a tentative registry case means the registry monitor is not sure if it qualifies to a registry case
 - c. Marked for Deletion – the record is marked for deletion and is not counted as a registry case
 - d. Not a case – case was submitted to registry and it then turns out to be not a registry case.

Select from the dropdown box and enter any comments in the blank box provided.

Enter Case Resolution - Screened (continued)

Based on the status chosen, the cases appear or not appear on specific registry reports e.g. Marked for Deletion cases do not appear on any report.

11. **History:** The history of all the resolutions for a client will be displayed at the bottom of the screen. By clicking on the date in the history table, the corresponding DC (diagnosed case) record will appear on the screen.
12. **Buttons:**
 - a. **Save:** Saves all changes.
 - b. **Cancel:** Cancels current operation without saving.
 - c. **Submit to Registry:** Saving the record does not enter the case into the registry. Only the PDES Registry monitor will be able to submit the case to the registry.

Enter Confirmatory Test Results

Data Intake >> Case Summary (NBS) >> Conf Test Results

This screen allows users to enter the client test results from a non-contract laboratory. This screen will also allow the user to update or delete existing test results, which are displayed in the Test Result History grid.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (NBS) >> Conf Test Results

Client Name: ACERO, JULIAN Date of Birth: 9/9/2003

Accession Number: 256-75-020/21-2003-11

Enter Confirmatory Test Result

Lab Name: KAISER

*Test Type: Serum TSH

If Other, Specify:

CF Sweat Test Lab Name

Date Collected: 03/15/2007

*Test Date: 03/15/2007

Result: 3.8

*Interpretation: Normal

If Other, Specify:

Reference Range:

Comments:

Test Result History

Select:	Test Date	Test Type	Interpretation
<input checked="" type="checkbox"/>	03/15/2007	Serum TSH	Normal

Save Cancel

- Client information is displayed in a read-only format.
- Enter results of a new test in the **Enter Confirmatory Test Results** area. **Test Type**, **Test Date** and **Interpretation** are required fields. Lab test **Interpretation** involves multiple criteria to establish a correct diagnosis. This dropdown box contains several descriptive test results choices: Normal, Abnormal, Questionable, Unknown and Other.
- Test Result History** is displayed in a data grid. Previous test results for the client are displayed here. Newly-entered test results create a new record in the data grid.
- Buttons:**
 - Save:** Saves all data.
 - Cancel:** Cancels entire operation.

Enter NT Screen

Data Intake » Search for 1st T Specimen » Enter NT Data

The **Enter NT** screen is used to save, view and print NT information about a specific 1st Trimester specimen in SIS. The fields displayed in the Enter NT screen are common across all accession numbers.

To navigate to Enter NT screen, you should search for 1st T specimen from **Search for 1st T Specimen** page using accession number or TRF #.

FIGURE 1

1. The NT header displays **Client information** like Client Name, Date of Birth, TRF #, Accession Number, Practitioner Credential #.
2. The NT Practitioner has to **enter the NT information** for the specimen such as NT Exam Date, Twin Pregnancy, Chorionicity, CRL Measurements for Fetus A/B, NT Measurements for Fetus A/B.

Enter NT Screen (continued)

3. Buttons

- The Save button saves NT information. The data that was entered will be retained in the field in read-only mode for reference.
- The View/Refresh button allows displaying details of Interps for Positive, ISI and Preliminary Risk Assessment. Please note that for Positives and ISI cases the NT practitioner need to get the coordinator to confirm the case information before the NT practitioner can view the Interp details.
- Print Interps button opens a new window to display the details of Interps.

Figure 2

Accn=170-33-450/A -2008-11 TRF=F000000345A PractitionerCredential=P01001 Name=Shartra, Dessy D - Microsoft Internet Explorer

GDB-SIS

Data Intake

Search for 1st T Specimen

Data Intake » Search for 1st T Specimen » Enter NT Data

Client Name: Shartra, Dessy Date of Birth: 11/27/1976
 TRF #: F000000345A Accession Number: 170-33-450/A -2008-11
 Practitioner Credential#: P01001

Supervisor Credential #
 NT Site ID
 NT Site Name

* NT Exam Date: 06/14/2008

* Is this a twin pregnancy? Yes

If Yes, Chorionicity: Dichorionic

* Fetus A
 NT Measurement: 66.8 mm
 NT Measurement: 4.5 mm

* Fetus B
 NT Measurement: 68.7 mm
 NT Measurement: 5.4 mm

Save View/Refresh Interps Print Interps

sdeb:: 12/12/2008 00:00:00.000

Session time remaining :00:59:59 seconds.

Local intranet

- The data entered by the NT Practitioner is shown in read-only mode in the text fields.
- Buttons:**
 - The Save button is disabled.
 - View/Refresh Interps allows to view detail Interp details depending on Positive/PRA/ISI interps. NRAG interps are not allowed to be viewed.
 - Print Interps is enabled for Positive/PRA/ISI interps.

Enter Other Mutation Test Results

Data Intake >> Enter Other Mutation Test Results

This screen captures the results of any additional Cystic Fibrosis mutation analyses received from the CF Foundation, CF Centers, or other sources.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Enter Other Mutation Test Results

Client/Case Search
Id Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Lab CoFC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Addl Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
Case Resolution
MPKU Registry Search
Metabolic Service Report
Reassign MC
Cystic Fibrosis Service Report
Reassign CF
MS/MS Ref Lab Exptd
View Holding Tank Records
Expected Phe Monitoring
Enter Other Mutation Test Results
MC Annual Patient Summary

Client Name: PORTEOUS Date of Birth: 9/27/2006
Accession Number: 273-88-030/21-2006-22

Test Result History

Select	Test Date	Test Name	Mutation Results
<input type="radio"/>	03/15/2007	ACMG 23	delF508, delI507

New Update View

Enter Other Mutation Test Results

Lab Name: Clinical Molecular Diagnostic Laboratory
Test Name: ACMG 23
Date Collected: 03-15-2007
Test Date: 03-15-2007

If Other Specify

- Displays client and case information in read-only format.
- Test Result History:** Lists all mutation test results that have been entered for the client in the grid. Use the **Select** radio button to indicate the specific mutation test result to be displayed.
- Buttons:**
 - New:** Displays a new, blank mutation test result form for the patient.
 - View:** Displays the mutation test result selected in the grid in read-only mode.
 - Update:** Displays the mutation test result selected in the grid in update mode.
- Enter the high level details of the test that was performed.
 - Select the name of the lab that performed the test from the **Lab Name** field. If a lab other than those listed in the drop down box performed the test, select **Other**, and specify the lab name in the blank box that follows.

Enter Other Mutation Test Results (continued)

- b. Select the name of the test that was performed from the **Test Name** field.
- c. Enter the date that the specimen was collected in the **Date Collected** field. If desired, use the calendar icon.
- d. Enter the date that the test was performed in the **Test Date** field. If desired, use the calendar icon.

Enter Other Mutation Test Results (continued)

FIGURE 2

Reassign CF
Reassign MC
Enter Other Mutation Test Results
MS/MS Ref Lab Expected
View Holding Tank Records
MC Annual Patient Summary
Expected Phe Monitoring
CFC Annual Patient Summary
View CFF File Records

msc::001
04/12/2007
09:24:51.640

	Name	Deleterious	Novel?	On Which Chromosome?
Mutation 1	delF508	Yes, known	No	First
# If Other Specify				
Mutation 2	delI507	Yes, known	No	Second
# If Other Specify				
Mutation 3	Select	Select	Select	Select
# If Other Specify				
Mutation 4	Select	Select	Select	Select
# If Other Specify				
Mutation 5	Select	Select	Select	Select
# If Other Specify				

Number

Poly T 1: 5

Poly T 2: 7

On Which Chromosome?

Select

Select

Interpretation: CF

Save Cancel

5. Enter the details of any mutations that were identified for the test. For each mutation, note the following:
 - a. Select the mutation **Name** from the dropdown box. If a mutation other than those listed in the drop down box was identified, select **Other**, and specify the mutation name in the **If Other Specify** field that follows.
 - b. Select whether the mutation is **Deleterious**.
 - c. Select whether the mutation is a **Novel** variation.
 - d. Select the chromosome on which the mutation appeared.
6. Enter any additional details regarding the test.
 - a. Select any **Poly Ts** that were identified and the chromosome on which they appeared.
 - b. Enter the overall **Interpretation** derived from the test.

Note: If further mutation testing changes current test results, the revised results must be updated on the Case Resolution screen by the NBS Coordinator. Data from this screen will not be displayed elsewhere in SIS.
7. **Buttons:**
 - a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated mutation test result appears in the **Test Result History** grid that is displayed.
 - b. **Cancel:** Closes the detailed form without saving changes.

Enter PSR

Follow Up Center >> Case Summary (PNS) >> Enter PSR

The **Enter PSR** screen (**FIGURE 1**) will allow a PDC to begin entering a Patient Services Report (PSR) to document the services provided to a patient by a PDC. Several prerequisites should be met before a PSR can be entered. A Case Coordination Center (CCC) must first refer a patient to your PDC. Once the referral has been made, you can enter/update appointment information by clicking on the Appointments 3rd level link. An appointment with the patient must be “Scheduled” and “Kept” for second trimester cases or “Scheduled” and “Kept” or “GC Appt Kept - Dx Not Scheduled” for first trimester cases in SIS.

Each service type has a separate screen in SIS. The screens for each of these services are also described in this User Manual. The screens are:

- Enter PSR Genetic Counseling (GC)
- Enter PSR Amniocentesis (AM)
- Enter PSR Ultrasonography (US)
- Enter PSR Smith-Lemli-Opitz Syndrome (SLOS)
- Enter PSR Other/Karyotype (Other/Karyo)
- Enter PSR Pregnancy Status (PregStatus)
- Enter PSR CVS (Chorionic Villus sampling)
- Enter PSR Modified Genetic Counseling (Modified GC)

The details of **Enter PSR** screen are mentioned below:

FIGURE 1

Data Intake >> Case Summary (PNS) >> Enter PSR 1

Update Case (PNS) Case Notes Link PNS Cases Re-assign CCC Tracking Events
 Appointments Services History Enter PSR Link Client to Entity Unlink Specimens
 GA Calculator

Back Next

*Last Name of Person Completing Form: BROWN
 *First Name of Person Completing Form: CHARLES
 *Date Form Completed: 01-01-2008

Patient Information - 2nd Trimester Referral

Genetic Disease Screening Program Accession Number: 222-15-806/P-2008-72

*Last Name: DOE
 First Name: JANE
 Maiden Name:
 Birthdate: 08-15-1954
 Social Security Number: 000-00-0000
 PDC Medical Record Number:
 PDC Code - Center Name: 03a - Prenatal Diagnosis of Northern Calif.
 PNS Referral due to:
☒ Down syndrome
☐ Trisomy 18
☒ Neural Tube Defect
☒ Smith-Lemli-Opitz syndrome
☐ Other
 *Number of Fetuses in this Pregnancy: 1

1. Navigation and screen name
2. PSR entry begins with Last and First Name of the person completing the PSR form.
3. **Date Form Completed.** You may enter the date or select the date from the calendar dropdown. The label displays the trimester information.

Enter PSR (continued)

FIGURE 2

Data Intake >> Case Summary (PNS) >> Enter PSR

Update Case (PNS) | Case Notes | Link PNS Cases | Re-assign CCC | Tracking Events
 Appointments | Services History | Enter PSR | Link Client to Entity | Unlink Specimens
 GA Calculator

Back Next

*Last Name of Person Completing Form: BROWN
 *First Name of Person Completing Form: CHARLES
 *Date Form Completed: 01-01-2008

Patient Information - 2nd Trimester Referral

Genetic Disease Screening Program Accession Number: 222-15-806/P-2008-72

*Last Name: DOE
 First Name: JANE
 Maiden Name:
 Birthdate: 08-15-1954
 Social Security Number: 000-00-0000
 PDC Medical Record Number:
 PDC Code - Center Name: 03a - Prenatal Diagnosis of Northern Calif.
 PNS Referral due to Screen Positive For:
☒ Down syndrome
☐ Trisomy 18
☒ Neural Tube Defect
☒ Smith-Lemli-Opitz syndrome
☐ Other
 *Number of Fetuses in this Pregnancy: 1

- Patient Information** is pre-filled based on the information in the Case Summary. Last Name, First Name, Maiden Name, Social Security Number and PDC Medical Record Number fields are pre-filled. Only Name fields, Social Security and PDC Medical Record Number may be edited. A date of birth or screening indication change must be communicated to the Case Coordination Center (CCC). PDC Code and Center name changes can be directed to GDB.

Note: 1. Last Name is a required field.

2. "PNS referral due to Screen Positive For" fields are disabled and will always be populated from the latest interpretation results.

3. For first trimester cases only "Down Syndrome", "Trisomy 18" and "Other" checkboxes will be visible.

Enter PSR (continued)

FIGURE 3

Expected Phe Monitoring

MC Annual Patient Summary

CFC Annual Patient Summary

View CFF File Records

Search for 1st T Specimen

*Number of Fetuses in this Pregnancy (including fetal demises): 5 Other 1

Authorization Details

*Were special exceptions and/or special services authorized by staff at the Genetic Disease Screening Program?: 6 No

Last Name of person at the GDSP who authorized services: 7

8 **Services Authorized by Prenatal Screening Program and Provided at your center.**

	Date	Service	Status	Provider
<input type="radio"/>	07/24/2008	Genetic Counseling	Provided	Filkins, Karen
<input type="radio"/>		Chorionic Villus Sampling	Declined	
<input type="radio"/>	09/26/2008	Modified Genetic Counseling	Provided	Filkins, Karen
<input type="radio"/>	09/26/2008	Ultrasound	Provided	Filkins, Karen
<input type="radio"/>	09/26/2008	Amniocentesis	Provided	Filkins, Karen
<input type="radio"/>	09/26/2008	AF-AFP/AChE Analysis	Provided	
<input type="radio"/>				

9

Review Results
Modify Service

[View or Add CVS Karyotype](#)
[View or Add Other Service](#)
[View Subsequent Information Acquired and Pregnancy Status](#)

Save
Back
Next
Submit

msc::001
 08/01/2008
 00:01:00.000

5. **Number of Fetuses in this Pregnancy** (including fetal demises) is a required dropdown field denoted by the asterisk (*).
6. Special Services Authorization information is a required dropdown field denoted by the asterisk (*). You must select "Yes" or "No" from the dropdown.
7. If Special Services were authorized, the last name of the person at GDB who authorized the follow-up services becomes a required field.
8. **Services Authorized** grid will contain a list of all services and related information that have been entered into the PSR. As you enter and save service information throughout the PSR, the service will be added to this grid.
9. **Buttons:**
 - a. **Modify Service** - You may select a service using the radio button in the grid, then click the **Modify Service** button to edit or delete a service in the grid, or add another authorized service of the same type. This will display the screen corresponding to this service.
 - b. **Review Results** - The **Review Results** button displays the screen corresponding to the results of the service that is selected using the radio button next to the grid entry. The screen opens up in a normal mode and any further operation scan be performed on the screen.

Enter PSR (continued)

FIGURE 4

Expected Phe Monitoring

MC Annual Patient Summary

CFC Annual Patient Summary

View CFF File Records

Search for 1st T Specimen

*Number of Fetuses in this Pregnancy (including fetal demises):

Authorization Details

*Were special exceptions and/or special services authorized by staff at the Genetic Disease Screening Program?:

Last Name of person at the GDSP who authorized services:

Other

1

No

Services Authorized by Prenatal Screening Program and Provided at your center.

Date	Service	Status	Provider
07/24/2008	Genetic Counseling	Provided	Filkins, Karen
	Chorionic Villus Sampling	Declined	
09/26/2008	Modified Genetic Counseling	Provided	Filkins, Karen
09/26/2008	Ultrasound	Provided	Filkins, Karen
09/26/2008	Amniocentesis	Provided	Filkins, Karen
09/26/2008	AF-AFP/AChE Analysis	Provided	

Review Results

Modify Service

View or Add CVS Karyotype

View or Add Other Service

View Subsequent Information Acquired and Pregnancy Status

Save

Back

Next

Submit

10. **View or Add CVS Karyotype** link enables navigation to the Chorionic Villus sampling screen where CVS service and CVS Karyotype details can be entered. This link will be enabled only for 1st Trimester PSRs.
11. **View or Add Other Service** link enables navigation to the Enter PSR Other/Karyo screen. Here, Other Services such as Placental Biopsy, Fetal Tissue Karyotype and PUBS can be entered. Also the Karyotype information (for Amniocentesis or for any of the above mentioned Other Services) can be entered on this screen. This link will be available for 2nd Trimester PSRs, or for those 1st Trimester PSRs for which Amniocentesis and Karyotype services get authorized when the GA becomes 15 weeks or more.
12. **View Subsequent Information Acquired and Pregnancy Status** link enables navigation to the Enter PSR – PregStatus screen where pregnancy status and any subsequent information for the pregnancy can be entered. This link is available for 1st Trimester as well as 2nd Trimester PSRs.

Enter PSR (continued)

FIGURE 5

Expected Phe Monitoring

MC Annual Patient Summary

CFC Annual Patient Summary

View CFF File Records

Search for 1st T Specimen

*Number of Fetuses in this Pregnancy (including fetal demises): Other

1

Authorization Details

*Were special exceptions and/or special services authorized by staff at the Genetic Disease Screening Program?: No

Last Name of person at the GDSP who authorized services:

Services Authorized by Prenatal Screening Program and Provided at your center.

Date	Service	Status	Provider
07/24/2008	Genetic Counseling	Provided	Filkins, Karen
	Chorionic Villus Sampling	Declined	
09/26/2008	Modified Genetic Counseling	Provided	Filkins, Karen
09/26/2008	Ultrasound	Provided	Filkins, Karen
09/26/2008	Amniocentesis	Provided	Filkins, Karen
09/26/2008	AF-AFP/AChE Analysis	Provided	

Review Results
Modify Service

[View or Add CVS Karyotype](#)
[View or Add Other Service](#)
[View Subsequent Information Acquired and Pregnancy Status](#)

Save
Back
Next
Submit

msc::001
08/01/2008
00:01:00.000

12

13. Buttons:

- a. **Save-** saves the information entered in the PSR. Once you click **Save**, any resulting PSR Inconsistencies will be displayed at the top of the screen. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR to GDB.
- b. **Back-** returns you to the previous screen in SIS, discarding any unsaved information.
- c. **Next-** will move you through each service (GC, US, SLOS, Other/Karyo, PregStatus) screen and allow you to enter details for each service provided.
- d. **Submit-** begins the PDC invoicing process. The **Submit** button will be unavailable until you have completed the PSR information and you are returned to the Enter PSR screen, which is the screen that has the **Services Authorized** grid. This grid displays a summary of the service information you have entered.
 - If there are any inconsistencies (red text messages at the top of the screen) on the PSR, an "Alert" message will be sent to GDB staff to notify them of the inconsistencies. If there are no inconsistencies, the PDC information will be sent to the Business Services System (BSS) for invoice processing.

Enter PSR (continued)

- Alerts 34, 35, 93, 94, New Alert 17, New Alert 18, New Alert19 and Alert 15 may get fired on PSR submission, depending on the other PSR conditions. DE 211 is also fired on PSR submission.
- PSR Submission Date, Inconsistency Resolved Date and Inconsistency Unresolved Date are added to the audit trail on PSR submission.
- Note: the PDC must click the **Save** button, then the **Submit** button on the Enter PSR screen before SIS will allow GDB staff to assist with any related inconsistencies.

Enter PSR – AM (Amniocentesis)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - AM

The **Enter PSR-AM** screen will allow the PDC to enter information for Amniocentesis service(s) provided. You may navigate to this screen or other PSR screens by: 1) clicking the **Next** button to progress through the PSR screens, or 2) selecting an Amniocentesis service record from the services grid on the Enter PSR screen and clicking the '**Add New Service**' button. Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

The screen was modified to display trimester information.

FIGURE 1

1. Navigation and screen name.
2. Client information is displayed in a read-only format.
3. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the Amniocentesis results grid.
4. **Amniocentesis Services** information: You must select a radio button to indicate whether Amniocentesis Services were "Provided", "Declined", "Not Indicated" or "Not Authorized". If this service was not provided, you **must** select an Amniocentesis Service status radio button ("Provided", "Declined", "Not Indicated", or "Not Authorized") to add a record to the grid and click the **Save** button before moving on to the next PSR screen.

Enter PSR – AM (Amniocentesis) (continued)

FIGURE 2

GDB-SIS

Data Intake > Case Summary (PNS) > Enter PSR - AM

Appointments Services History Enter PSR GA Calculator

Back Next

Client Name: AARONS, SHANNON Date of Birth: 8/7/1963
Accession Number: 189-87-120/A -2008-64

Amniocentesis - 1st Trimester Referral

Fetus (Letter): ☒ A
Amniocentesis Services: ☒ Provided ☐ Declined ☐ Not Indicated
☐ Not Authorized
Date Amniocentesis Provided: 08/06/2008
Name of Provider: Heddleston, Les

Add to Grid Update Cancel

Service	Status	Date	Provider	Fetus (Letter)
Amniocentesis	Provided	08/06/2008	Filkins, Karen	A

Edit Delete

Date of Amniocentesis Provided: You must enter a date of service for Amniocentesis if it was performed and you selected the radio button “Provided” or “Not Authorized”.

5. **Name of Provider:** You must select the name of provider from the dropdown if the Amniocentesis service was provided.
6. **Buttons:**
 - a. **Add to Grid** – adds the entered service information to the service grid to the grid.
 - b. **Update** – allows you to change information in a selected record from the grid. You must click the **Edit** button, make your changes to Amniocentesis Service information and then click the **Update** button to save the update.
 - c. **Cancel** – clears the entered information in the Amniocentesis fields (3-6) discarding any unsaved information.
7. The Service grid displays the status of Amniocentesis service(s) on a specific date with a specific provider if this service was “Provided” or “Not Authorized”. Once you’ve clicked the **Add to Grid** button, a row will be added to the grid to display the Amniocentesis information you have entered in the fields above.
8. **Buttons:**
 - a. **Edit** – populates the information for the selected service record in the Amniocentesis services fields, allowing you to edit the existing information.
 - b. **Delete** – deletes the service you have selected from the Amniocentesis service grid.

Enter PSR – AM (Amniocentesis) (continued)

FIGURE 3

Results Determined From Services

Fetus (Letter): ☒ A

Was adequate Amniotic fluid collected?

AF-AFP (in M.o.M.):

If AF-AFP M.o.M. is not available, give reason

If AF-AFP is over 2.0 M.o.M. and/or positive AF-AChE did patient receive another Ultrasound?

AF-AChE:

10 Add to Grid Update Cancel

Amniocentesis Results

Select:	Fetus (Letter)	AF-AFP (in M.o.M.)	AF-AChE
C	A	1.05	Negative

11

12

Edit Delete

Save Back Next

9. **Amniocentesis results.** Select or enter the results information.

10. **Buttons:**

- Add to Grid** – adds the AF-AFP and AF-AChE results to the grid. If you select “Provided” or “Not Authorized” in the Amniocentesis Services field, you must add the results to the grid before clicking the **Save** button and moving to the next PSR screen.
- Update** – allows the user to update Amniocentesis results after selecting a record from the Amniocentesis results grid.
- Cancel** – clears the entered information in the Amniotic fluid and AF-AFP/AChE fields, discarding any unsaved information.

11. **Amniocentesis Results** grid displays the results you have added in the fields (10) above.

12. **Buttons:**

- Edit** – populates the information for the selected result record in the Amniocentesis result field allowing you to edit the existing information.
- Delete** – deletes the information for the selected result record you have selected from the **Amniocentesis Result** grid.
- Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Amniocentesis will be displayed at the top of the screen. The

Enter PSR – AM (Amniocentesis) (continued)

inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

- d. **Back** – returns you to the previous screen in SIS discarding any unsaved information.
- e. **Next** – moves you to the **Enter PSR – SLOS** screen.

Enter PSR – CVS (Chorionic Villus Sampling)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - CVS

The **Enter PSR-CVS** screen will allow the PDC to enter information for CVS service(s) provided. You may navigate to this screen or other PSR screens by: 1) clicking the **Next** button to progress through the PSR screens, or 2) selecting an CVS service record from the services grid on the Enter PSR screen and clicking the '**Add New Service**' button. Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

- This screen was created for new PSR services for CVS and related business functionalities
- This screen also addresses new inconsistencies

FIGURE 1

Client/Case Search
View Client Profile
Case Summary (PNS)

Data Intake >> Case Summary (PNS) >> Enter PSR - CVS

Appointments Services History Enter PSR GA Calculator

Back Next

Client Name: AARTMAN, MICHELL Date of Birth: 5/12/1970
Accession Number: 177-92-047/A -2008-63

Chorionic Villus Sampling - 1st Trimester Referral

Chorionicity: ☐ Monochorionic ☐ Dichorionic ☐ Unable to Determine
Fetus (Letter):
Chorionic Villus Sampling Services: ☒ Provided ☐ Declined ☐ Not Indicated
☐ Not Authorized ☐ Not Available ☐ Not Able to be Performed
Date CVS Provided: 07/02/2008
CVS Type: ☐ TransABDOMINAL(TA) ☒ TransCERVICAL(TC)
Name of Provider: Hershey, Douglas

Add to Grid Update Cancel

Service	Status	Date	Provider	Fetus (Letter)
C TransABDOMINAL CVS	Provided	07/02/2008	Hershey, Douglas	A

Edit Delete

- Navigation and screen name.
- Client information is displayed in a read-only format.
- User can select **Chorionicity** when numbers of fetuses are more than one. When only one fetus is present, chorionicity radio buttons are disabled.
- Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the CVS services grid.
- CVS Services** information: You must select a radio button to indicate whether CVS Services were "Provided", "Declined", "Not Indicated", "Not Authorized", "Not Available" or "Not Able to be Performed". If this service was not provided, you **must**

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

select an CVS Service status radio button (“Provided”, “Declined”, “Not Indicated”, “Not Authorized”, “Not Available” or “Not Able to be Performed”) “Not Indicated”, or “Not Authorized”) to add a record to the grid and click the **Save** button before moving on to the next PSR screen.

If the PDC does not offer CVS, then the “Not Available” radio button will be pre-populated and the radio button will be grayed out.

FIGURE 2

Client/Case Search
View Client Profile
Case Summary (PNS)

Data Intake | Monitor | Follow Up Center | CCC | Utilities

Data Intake » Case Summary (PNS) » Enter PSR-CVS

Appointments | Services History | **Enter PSR** | GA Calculator

Back | Next

Client Name: AARTMAN, MICHELL
Accession Number: 177-92-047/A ~2008-63
Date of Birth: 5/12/1970

Chorionic Villus Sampling - 1st Trimester Referral

Chorionicity: ☐ Monochorionic ☐ Dichorionic ☐ Unable to Determine

Fetus (Letter): ☒ A

Chorionic Villus Sampling Services:

☒ Provided ☐ Declined ☐ Not Indicated
☐ Not Authorized ☐ Not Available ☐ Not Able to be Performed

Date CVS Provided: 07-02-2008

CVS Type: ☐ TransABDOMINAL(TA) ☒ TransCERVICAL(TC)

Name of Provider: Hershey, Douglas

Add to Grid | Update | Cancel

Service	Status	Date	Provider	Fetus (Letter)
<input type="checkbox"/> TransABDOMINAL CVS	Provided	07/02/2008	Hershey, Douglas	A

Edit | Delete

18. **Date of CVS Provided:** You must enter a date of service for CVS if it was performed and you selected the radio button “Provided” or “Not Authorized” as CVS service status.
19. **CVS Type:** You must enter a type of service for CVS if it was performed and you selected the radio button “Provided” or “Not Authorized” as CVS service status.
20. **Name of Provider:** You must select the name of provider from the dropdown if the CVS service was performed and you selected the radio button “Provided” or “Not Authorized” as CVS service status.
21. **Buttons:**
 - d. **Add to Grid** – adds the entered service information to the service grid to the grid.
 - e. **Update** – allows you to change information in a selected record from the grid. You must click the **Edit** button, make your changes to CVS Service information and then click the **Update** button to save the update.
 - f. **Cancel** – clears the entered information in the CVS fields (5-8) discarding any unsaved information.

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

22. The Service grid displays the status of CVS service(s) on a specific date with a specific provider if this service was “Provided” or “Not Authorized”. Once you’ve clicked the **Add to Grid** button, a row will be added to the grid to display the CVS information you have entered in the fields above.

23. Buttons:

- c. **Edit** – populates the information for the selected service record in the CVS services fields, allowing you to edit the existing information.

When any of the records from service grid is in Edit mode:

- Chorionicity radio buttons will be pre populated based on the initial selection, and disabled.
- Fetus letter checkboxes will be pre populated based on the selection from the grid, and disabled.

- d. **Delete** – deletes the service you have selected from the CVS service grid.

FIGURE 3

Results Determined From Services

CVS Karyotype Result

Fetus Letter: ☒ A

CVS Karyotype diagnosis: ☐ Not Performed ☒ Abnormal

☐ Normal Male (Include normal variants) ☐ Normal Female (Include normal variants)

☐ Normal (Gender not revealed) ☐ Culture Failed

Lab completing study: 0139 - Genzyme Genetics Laboratory

Cytogenetic lab specimen number: LAB1211

If CVS Karyotype abnormal, designate abnormality: ☒ Down syndrome ☐ Trisomy 18 ☐ Other Abnormal Karyotype

☐ Mosaic

Abnormal CVS Karyotype result/cytogenetic diagnosis (ISCN short form): XY+45

Results

Select:	Fetus	Karyotype Diagnosis	Abnormal Karyotype (ISCN)
C	A	Abnormal	XY+45

24. **CVS Karyotype results:** Select or enter the results information.

25. **CVS Karyotype diagnosis:** Select one of the radio buttons (“Not Performed”, “Abnormal”, “Normal Male”, “Normal Female”, “Normal”, “Culture Failed”) to indicate CVS karyotype diagnosis. Based on following conditions, fields are enabled or disabled.

- Only when the user selects “Abnormal” as the CVS Karyotype Diagnosis, the “Abnormal CVS Karyotype result/cytogenetic diagnosis (ISCN short form)” text box will be enabled.
- If the user selects “Not Performed” or “Culture Failed” as the CVS Karyotype Diagnosis, then “Name of Lab Completing Study” dropdown, “Cytogenetic Lab Specimen Number” textbox, “If CVS Karyotype abnormal, designate abnormality”

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

- radio buttons and “Abnormal CVS Karyotype result/cytogenetic diagnosis (ISCN short form):” textbox are disabled.
- If CVS Karyotype Diagnosis is selected as “Normal Male”, “Normal Female” or “Normal (Gender not revealed)”, then “Add to Grid” and “Update” buttons are enabled only when a value is entered/selected in “Lab completing study” field and the “Cytogenetic lab specimen number” field.
 - If CVS Karyotype Diagnosis is selected as “Abnormal”, then “Add to Grid” and “Update” buttons are enabled only when a value is entered/selected in the “Lab completing study” field, the “Cytogenetic lab specimen number” field, the “If CVS Karyotype abnormal, designate abnormality” field, and the “Abnormal CVS Karyotype result/ Cytogenetic diagnosis (ISCN short form)” field.

FIGURE 4

Results Determined From Services

CVS Karyotype Result

Fetus Letter:

CVS Karyotype diagnosis: ☐ Not Performed ☒ Abnormal
☐ Normal Male (Include normal variants) ☐ Normal Female (Include normal variants)
☐ Normal (Gender not revealed) ☐ Culture Failed

Lab completing study: (14)

Cytogenetic lab specimen number: (15)

If CVS Karyotype abnormal, designate abnormality: ☒ Down syndrome ☐ Trisomy 18 ☐ Other Abnormal Karyotype
☐ Mosaic (16)

Abnormal CVS Karyotype result/cytogenetic diagnosis (ISCN short form): (17)

(18) (19)

Results

Select:	Fetus	Karyotype Diagnosis	Abnormal Karyotype (ISCN)
<input type="radio"/>	A	Abnormal	XY+45

(20)

- Lab completing study:** Select name of lab.
- Cytogenetic lab specimen number:** Enter lab specimen number into text box.
- CVS Karyotype Abnormality:** Select one of the radio buttons (“Down syndrome”, “Trisomy 18”, “Other Abnormal Karyotype”, “Mosaic”) to indicate CVS Karyotype abnormality.
- CVS Karyotype result / cytogenetic diagnosis:** Enter CVS Karyotype result or cytogenetic diagnosis into textbox.
- Buttons:**
 - Add to Grid** – adds the CVS Karyotype results to the grid. CVS Karyotype results can be added only if you select “Provided” or “Not Authorized” in the CVS Services.
 - Update** – allows the user to update CVS Karyotype results after selecting a record from the CVS Karyotype results grid.

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

- f. **Cancel** – clears the entered information in the “CVS Karyotype diagnosis”, “Lab completing study”, “Cytogenetic lab specimen number”, “If CVS Karyotype abnormal, designate abnormality” and “Cytogenetic diagnosis” fields, discarding any unsaved information.

31. **Results** grid displays the results you have added in the fields (12) above.

32. **Buttons:**

- f. **Edit** – populates the information for the selected result record in the CVS Karyotype result field allowing you to edit the existing information.
- g. **Delete** – deletes the information for the selected result record you have selected from the **CVS Karyotype Result** grid.
- h. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for CVS will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.
- i. **Back** – returns you to the previous screen in SIS discarding any unsaved information.
- j. **Next** – moves you to any one of the following screen based on appointment status, case trimester, gestational age and special authorization for CVS.
 - a. **Enter PSR – SubsequentInfo**
 - b. **Enter PSR – Modified GC**
 - c. **Enter PSR – US.**

Enter PSR – GC (Modified Genetic Counseling)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - GC

The **Enter PSR - GC** screen will allow you to enter information for Genetic Counseling (Modified) service(s) provided by your PDC. This service is called Modified Genetic Counseling because Interpretation Factors and Final Interpretation cannot be changed during this service. This service is provided when a Genetic Counseling service has already been provided at a PDC for a 1st Trimester specimen, and the patient opts for diagnostic service in the 2nd Trimester (entered on the same 1st Trimester PSR). You may navigate to this screen or other PSR screens by:

- 1) Clicking the **Next** button to progress through the PSR screens, or
- 2) Selecting a Modified Genetic Counseling service record from the service grid on the Enter PSR screen and clicking the **Modify Service/Review Results** button.

Enter PSR – GC (Modified Genetic Counseling)

FIGURE 1

Data Intake » Case Summary (PNS) » Enter PSR-GC

Update Case (PNS) Case Notes Link PNS Cases Re-assign CCC Tracking Events
 Appointments Services History Enter PSR Link Client to Entity Unlink Specimens
 GA Calculator

Back Next

Client Name: AARONS, SHANNON Date of Birth: 8/7/1963
 Accession Number: 189-78-141/A -2008-64

Modified Genetic Counseling - 1st Trimester Referral

Genetic Counseling Services: ☐ Provided ☐ Declined ☐ Not Indicated
☐ Not Authorized

Date Modified Counseling Provided: --
 Name of Provider:

Add to Grid Update Cancel

Service	Status	Date	Provider
Modified Genetic Counseling	Provided	09/26/2008	Filkins, Karen

Edit Delete

Save

1. Navigation and screen name.
2. **Buttons:**
 - a. **Back** - returns you to the previous screen in SIS, discarding any unsaved information.
 - b. **Next** – moves you to the Enter PSR-US screen.
3. Client information is displayed in a read-only format based on the client profile.
4. **Modified Genetic Counseling** information: The label displays the trimester details. You must select a radio button in the **Genetic Counseling Services** field to indicate whether Genetic Counseling was Provided, Declined, Not Indicated or Not Authorized. You may select the appropriate radio button and add a record to the grid by clicking on the **Add to Grid** button before moving on to the next PSR screen. The **Date Counseling Provided** is the date on which service was provided to the patient.

Enter PSR – GC (Modified Genetic Counseling)

5. **Date Modified Counseling Provided** must be entered if the radio button for “Provided” or “Not Authorized” is selected for Genetic Counseling services.
6. **Name of Provider** must be selected from the dropdown if the “Provided” or “Not Authorized” radio button is selected for Genetic Counseling services.
7. **Buttons:**
 - a. **Add to Grid** – adds the genetic counseling information you have entered to the Genetic Counseling services grid.
 - b. **Update** – allows you to save changes to an existing record (a row in the Genetic Counseling grid). After you have selected a record for editing (see 8a below), the **Update** button will become available.
 - c. **Cancel** – clears the entered information in the Genetic Counseling fields (3, 4 and 5) discarding any unsaved information.
8. The service grid lists the details of the modified genetic counseling service entered by you. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.
9. **Buttons:**
 - a. **Edit** – populates the information for the selected service record in the Genetic Counseling fields allowing you to edit the existing information.
 - b. **Delete** – allows you to delete a service record you have selected from the Genetic Counseling service grid.
 - c. **Save** - saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Modified Genetic Counseling service will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

Enter PSR – Other/Karyotype

Follow Up Center >> Case Summary (PNS) >> Enter PSR – Other/Karyo

The **Enter PSR – Other/Karyo** screen will allow you to enter information for Fetal Tissue Karyotype, Placental Biopsy and PUBS services provided by your PDC, as well as the Karyotype by one of the procedures or by amniocentesis. You may navigate to this screen or other PSR screens by: 1) clicking the **Next** button to progress through the PSR screens, or 2) selecting a Karyotype service record from the service grid on the Enter PSR screen and clicking the **Add New Service** button.

Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

- The screen was modified to display trimester information.
- New karyotype (Mosaic) display on this screen.

FIGURE 1

1 Data Intake >> Case Summary (PNS) >> Enter PSR - Other/Karyo

2 Client Name: AARONS, SHANNON Date of Birth: 8/7/1963
Accession Number: 189-87-120/A -2008-64

3 Other Services - 1st Trimester Referral

Other services: ☒ Fetal Tissue Karyotype ☐ Placental Biopsy ☐ PUBS

Date Procedure Provided: 08-06-2008 **4**

Provider: **5** Select

6 Add to Grid Update Cancel

Select:	Service	Date	Provider
<input type="radio"/>	Fetal Tissue Karyotype	08-06-2008	

Edit Delete

1. Navigation and screen name.
2. Client information is displayed in a read-only format, based on the client profile.
3. **Other Services** information: Select a radio button in the **Other Services** field to indicate which (if any) services Fetal Tissue Karyotype, Placental Biopsy or PUBS) were provided.
4. **Date Procedure Provided**: If you selected one of the Other services, then you must enter the date of the procedure.

Enter PSR – Other/Karyotype (continued)

5. **Provider:** If Placental Biopsy or PUBS was performed, you must enter a **Provider** name from the dropdown.
6. **Buttons:**
 - a. **Add to Grid** – adds the other services information you have entered to the Other service grid.
 - b. **Update** – allows you to save changes to an existing record (a row in the Other Service grid) after you have selected a record for editing (see 8).
 - c. **Cancel** – clears the entered information in the Other Services fields (3-5), discarding any unsaved information.

FIGURE 2

GDB-SIS

Data Intake Monitor Follow Up Center CCC Utilities

Data Intake » Case Summary (PNS) » Enter PSR - Other/Karyo

Appointments Services History Enter PSR GA Calculator

Back Next

Client Name: AARONS, SHANNON Date of Birth: 8/7/1963
Accession Number: 189-87-120/A -2008-64

Other Services - 1st Trimester Referral

Other services: ☒ Fetal Tissue Karyotype ☐ Placental Biopsy ☐ PUBS
Date Procedure Provided: 08-06-2008
Provider: Select

Add to Grid Update Cancel

Services

Select:	Service	Date	Provider
<input type="radio"/>	Fetal Tissue Karyotype	08-06-2008	

Edit Delete

7. The **Services** grid lists the other services provided on a specific date as well as the provider. Note: Fetal Tissue Karyotype does not need a Provider name but does need a date of service. To update a row, click the radio button next to the service you want to edit, then click the Edit button.
8. **Buttons:**
 - a. **Edit** – populates the information for the selected service record in the Other Services fields, allowing you to edit the existing information.
 - b. **Delete** – allows you to delete a service record you have selected from the Other services grid.

Enter PSR – Other/Karyotype (continued)

FIGURE 3

sparmar::03a
 08/06/2008
 00:00:00.000

Results Determined From Services

Authorized Karyotype or Subsequent Karyotype

Fetus Letter: 9 ☒ A

Karyotype diagnosis: 10 ☐ Not Performed ☐ Abnormal

11 ☒ Normal Male (Include normal variants) ☐ Normal Female (Include normal variants)

12 ☐ Normal (Gender not revealed) ☐ Culture Failed

Name of lab completing study (or lab code number): 11 0139 - Genzyme Genetics Laboratory

Cytogenetic lab specimen number: 12 LAB0139

If Karyotype abnormal, designate abnormality: 13 ☐ Down syndrome ☐ Trisomy 18 ☐ Other Abnormal Karyotype

☐ Mosaic

Abnormal Karyotype result/cytogenetic diagnosis (ISCN short form):

13

Results

Select:	Fetus	Karyotype Diagnosis	Abnormal Karyotype (ISCN)
C	A	Normal Male (Include normal variants)	

9. Check the **Fetus Letter** under the **Results Determined From Services** and **Authorized Karyotype or Subsequent Karyotype**. If the number of fetuses you entered on the Enter PSR screen in the required field – **Number of Fetuses in the Pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. You must select a fetus letter before adding a record to the Results grid.
10. **Karyotype diagnosis**: Select a radio button that corresponds to the Karyotype result. If an Amniocentesis or another service was performed, but the culture failed, select this option. If the Karyotype diagnosis is Abnormal, select this radio button and proceed to fields 13 and 14 after entering information for fields 11 and 12.
11. **Name of Lab completing study (or lab code number)**: Select one of your PDC's affiliated cytogenetic labs from the dropdown.
12. **Cytogenetic lab specimen number**: Enter the lab specimen number.
13. **If Karyotype abnormal, designate abnormality**: Check one of these boxes to designate the type of Abnormal Karyotype result, then proceed to (ISCN short form) field to enter the abnormal Karyotype nomenclature.

Enter PSR – Other/Karyotype (continued)

FIGURE 4

sparmar:03a
 08/06/2008
 00:00:00.000

Results Determined From Services

Authorized Karyotype or Subsequent Karyotype

Fetus Letter: ☒ A

Karyotype diagnosis: ☐ Not Performed ☐ Abnormal

☒ Normal Male ☐ Normal Female
 (Include normal variants) (Include normal variants)

☐ Normal (Gender not revealed) ☐ Culture Failed

Name of lab completing study (or lab code number): 0139 - Genzyme Genetics Laboratory

Cytogenetic lab specimen number: LAB0139

If Karyotype abnormal, designate abnormality: ☐ Down syndrome ☐ Trisomy 18 ☐ Other Abnormal Karyotype

☐ Mosaic

Abnormal Karyotype result/cytogenetic diagnosis (ISCN short form): 14

Results

Select:	Fetus	Karyotype Diagnosis	Abnormal Karyotype (ISCN)
<input type="radio"/>	A	Normal Male (Include normal variants)	

- 14. Abnormal Karyotype result/cytogenetic diagnosis (ISCN short form):**
 Enter the nomenclature for the abnormal International Karyotype. Please be certain to use the numbers, letters, commas, parentheses, semicolons, plus and/or minus signs and brackets. Do not use spaces between these numbers, letters and characters.

15. Buttons:

- a. **Add to Grid** –adds the entered results to the grid.
- b. **Update** – allows you to save changes to an existing record (a row in the Karyotype grid). After you have selected a record for editing (see 17a below) the **Update** button will become available.
- c. **Cancel** – clears the entered information in 9-14 above discarding any unsaved information.

- 16.** This grid displays Normal Karyotypes and Abnormal Karyotypes with the ISCN short form **Results**.

17. Buttons:

- a. **Edit** – allows you to edit the selected results from the Karyotype result.
- b. **Delete** – allows you to delete the selected results from the Karyotype result grid above.

Enter PSR – Other/Karyotype (continued)

- c. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Other/Karyotype will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.
- d. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.
- e. **Next** – moves you to the Enter PSR – PregStatus screen

Enter PSR – Pregnancy Status

Follow Up Center >> Case Summary (PNS) >> Enter PSR - PregStatus

The **Enter PSR-PregStatus** screen will allow you to enter the status of the pregnancy and patient information gathered after the initial PDC visit. You may navigate to this screen or other PSR screens by:

- 1) Clicking the **Next** button to progress through the PSR screens, or
- 2) Selecting a Pregnancy Status service record from the service grid on the Enter PSR screen and clicking the “**Modify Service/ Review Results**” button.

FIGURE 1

1. Navigation and screen name.
2. Client information is displayed in a read-only format, based on the client profile. The header label displays the trimester details.
3. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field – **Number of Fetuses in the Pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. You must select a fetus letter before adding a record to the Pregnancy status grid.
4. **Status of Pregnancy** is a field that should reflect the state of the pregnancy. Select from the following values:
 - a. Continuing Pregnancy
 - b. Known elective termination after PDC visit
 - c. Patient intends to have fetal reduction
 - d. Patient Undecided/Lost to follow-up or unknown
 - e. Fetal Loss after PDC visit (Fetal Demise/SAB/missed abortion)
 - f. Patient intends to have an Elective Termination

Enter PSR– Pregnancy Status (continued)

FIGURE 2

GDB-SIS

Data Intake » Case Summary (PNS) » Enter PSR - PregStatus

Update Case (PNS) **Case Notes** **Link PNS Cases** **Re-assign CCC** **Tracking Events**
Appointments **Services History** **Enter PSR** **Link Client to Entity** **Unlink Specimens**
GA Calculator

Client Name: ABAYA, MELISSA Date of Birth: 6/20/1980
 Accession Number: 213-83-038/P -2008-31

Pregnancy Status- 2nd Trimester Referral

Fetus letter: ☒ A
 Pregnancy Status:
 Update if pregnancy status has changed

Termination date: - -

Subsequent Information Acquired After Initial PDC Visit

Information acquired by:
 Specify other source:
 List additional diagnoses: ☐ 8

☐ NO ABNORMALITY
☐ NO ABNORMALITY ON ULTRASOUND
☐ FETAL DEMISE < 20 WEEKS
☐ FETAL DEMISE > OR = 20 WEEKS
☐ ANENCEPHALY

5. Termination date should only be entered if the pregnancy status is “Known elective termination after PDC visit”, or “Fetal Loss after PDC visit (Fetal Demise/SAB/missed abortion)”.
6. Under **Subsequent Information Acquired After Initial PDC Visit** section on the PSR where you can provide additional information. The **Information Acquired by** dropdown has the following available choices:

“Later Ultrasound”	“Later Karyotype”
“Pathology/Visual Report”	“Other, please specify”
7. **Specify other source** is the text box you should use if you select “Other” in the **Information Acquired by** field.
8. **List additional diagnoses** - Multiple checks are allowed. Be sure to uncheck the box for factors that do not apply when making updates.
9. **Later abnormal Karyotype result/cytogenetic diagnosis:** This textbox is enabled only when “Later Karyotype” is selected in the “Information acquired by” dropdown. Karyotype information can be entered in this field.

Enter PSR– Pregnancy Status (continued)

FIGURE 3

Test Results
View Holding Tank Records
Expected Phe Monitoring
MC Annual Patient Summary
CFC Annual Patient Summary
View CFF File Records
Search for 1st T Specimen

Other NTD (specify):
Other abnormalities (specify):
Later abnormal Karyotype result/cytogenetic diagnosis:

☐ ANENCEPHALY
☐ SPINA BIFIDA
☐ ABDOMINAL WALL DEFECT
☐ OLIGOHYDRAMNIOS
☐ PLACENTAL ABNORMALITIES
☐ SPINA BIFIDA WITH HYDROCEPHALY
☐ ENCEPHALOCELE
☐ GASTROSCHISIS
☐ OMPHALOCELE

Select Fetus	Pregnancy Status	Information Acquired By	Additional Diagnosis
C	A	Continuing Pregnancy	

NOTE: If there were several methods (later ultrasound, later karyotype, pathology/autopsy/visual report, or other method) used to obtain a diagnosis for the fetus after the initial PDC visit, indicate the one method providing the

10. Buttons:

- Add to Grid** – adds the information you have entered to the pregnancy status grid.
- Update** – allows you to save changes to an existing record (a row in the Pregnancy Status grid. After you have selected a record for editing (see 11 below), the **Update** button will become available.
- Cancel** – clears the entered information in the Pregnancy Status and Subsequent Information fields (3-8); discarding any unsaved information.

11. The pregnancy status grid lists the status of the pregnancy and additional diagnosis and what method it was acquired. Only one row can be added per fetus. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.

12. Buttons:

- Edit** – populates the information for the selected service record in the Pregnancy Status and Subsequent Information fields, allowing you to edit the existing information.
- Delete** – allows you to delete a service record you have selected from the pregnancy status grid

Enter PSR– Pregnancy Status (continued)

FIGURE 4

CCC Annual Patient Summary
View CCC Records
Search for 1st T Specimen

Other NTD (specify):
Other abnormalities (specify):
Later abnormal karyotype result/cytogenetic diagnosis:

☐ SPINA BIFIDA WITH HYDROCEPHALY
☐ ENCEPHALOCELE
☐ GASTROSCHISIS
☐ OMPHALOCELE

Add to Grid Update Cancel

Select Fetus	Pregnancy Status	Information Acquired By	Additional Diagnosis
C	A	Continuing Pregnancy	

Edit Delete

NOTE: If there were several methods (later ultrasound, later karyotype, pathology/autopsy/visual report, or other method) used to obtain a diagnosis for the fetus after the initial PDC visit, indicate the one method providing the definitive diagnosis. If a later karyotype was the method, please enter the karyotype above.

Comments:

13

14 Save Back Next

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17:12:25.023

13. **Comments** – A text box is provided for entry of comments.

14. **Buttons:**

- Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Pregnancy Status will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.
- Back** – returns you to the previous screen in SIS, discarding any unsaved information.
- Next** – moves you to the first screen Enter PSR where you can submit the PSR by clicking the **Save** button, then click the **Submit** button.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome)

Follow Up Center >> Case Summary (PNS) >> Enter PSR – SLOS

The **Enter PSR –SLOS** screen (Figure 1) will allow you to enter information for Smith-Lemli-Opitz syndrome (SLOS) services provided by your PDC. You may navigate to this screen or other PSR screens by:

- 1) Clicking the **Next** button to progress through the PSR screens, or
- 2) Selecting a SLOS service record from the service grid on the Enter PSR screen and clicking the **Modify Service/Review Results** button.

Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

FIGURE 1

Navigation and screen name. (1)

Client information is displayed in a read-only format based on the client profile. (2)

Smith-Lemli-Opitz syndrome Services - 2nd Trimester Referral

Smith-Lemli-Opitz syndrome Testing (3)

☐ Provided ☐ Declined ☐ Not Indicated ☐ Not Authorized

Add to Grid (4)

SLOS Services (5)

Select:	Service	Status
<input type="radio"/>	SLOS Diagnostic Testing	Not Indicated

Edit **Delete** (6)

1. Navigation and screen name.
2. Client information is displayed in a read-only format based on the client profile. The header label displays the trimester details.
3. **Smith-Lemli-Opitz syndrome Testing:** Select a radio button in the **Smith-Lemli-Opitz syndrome Services** field to indicate whether this service was “Provided”, “Not Indicated”, “Not Authorized” or “Declined”. If the patient’s screening indication is not SLOS positive, then select “Not Indicated”. If the patient’s screening indication is SLOS positive, then select “Provided” or “Declined”. You must select the appropriate radio button and add a record to the grid by clicking the **Add to Grid** button before moving on to the next PSR screen.
4. **Buttons:**
 - a. **Add to Grid** – adds the SLOS services information you have entered to the SLOS service grid.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

- b. **Update** – allows you to save changes to an existing record (a row in the SLOS service grid). After you have selected a record for editing (see 6), the **Update** button will become available.
 - c. **Cancel** – clears the entered information in the SLOS Services fields, discarding any unsaved information.
- 5. **SLOS Services** grid lists the status of SLOS services. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.
- 6. **Buttons:**
 - a. **Edit** – populates the information for the selected service record in the Smith-Lemli-Opitz Syndrome Services fields, allowing you to edit the existing information.
 - b. **Delete** – allows you to delete a service record you have selected from the SLOS Services grid.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

FIGURE 2

Smith-Lemli-Opitz syndrome Results

Fetus Letter: ☐ A

Smith-Lemli-Opitz syndrome Results:

7-Dehydrocholesterol ng level:

Can 8-Dehydrocholesterol ng level be detected?:

8-Dehydrocholesterol ng level:

Laboratory where test performed:

Results

Select:	Fetus	SLOS Results	7-DHC ng level	8-DHC ng level
<input type="radio"/>	A	Fetus Not Affected		

7. Check the **Fetus (Letter)**: If the Case Summary indicates more than one fetus, a letter will be displayed for each fetus. You must select a fetus letter before adding a record to the Results grid.
8. **Smith-Lemli-Opitz syndrome Results**: Select “Fetus Affected” or “Fetus Not Affected” or “Test Not Performed” only if SLOS Service Status is “Provided” or “Not Authorized”.
9. **7-Dehydrocholesterol ng level**: Enter a value if “Fetus Affected” or “Fetus Not Affected” in **SLOS Results** field.
10. **Can 8-Dehydrocholesterol ng level be detected?**: Select “No” if 8-DHC is below detectable limits and skip the next field (8-DHC ng level). If “Yes”, then proceed to 8-DHC ng level.
11. **8-Dehydrocholesterol ng level**: Enter a value if the response to “Can 8-DHC ng level be detected?” is “Yes”.
12. **Laboratory where test performed**: Select the Kennedy-Krieger Institute from the dropdown; you only need to select this laboratory if SLOS service status is “Provided” or “Not Authorized”.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

FIGURE 3

Smith-Lemli-Opitz syndrome Results

Fetus Letter: ☐ A

Smith-Lemli-Opitz syndrome Results:

7-Dehydrocholesterol ng level

Can 8-Dehydrocholesterol ng level be detected?

8-Dehydrocholesterol ng level

Laboratory where test performed

13

Results

14

Select:	Fetus	SLOS Results	7-DHC ng level	8-DHC ng level
<input type="radio"/>	A	Fetus Not Affected		

15

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13. Buttons:

- Add to Grid** – adds the SLOS results information you have entered to the SLOS results grid.
- Update** – allows you to save changes to an existing record (a row in the SLOS results grid). After you have selected a record for editing (see 15), the **Update** button will become available.
- Cancel** – clears the entered information in the SLOS Results fields, discarding any unsaved information.

14. **Results** grid: Displays SLOS services results. Only one results record may be added to the grid per fetus. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Add to Grid** button.

15. Buttons:

- Edit** – populates the information for the selected result record in the SLOS results fields allowing you to edit the existing information.
- Delete** – allows you to delete a result record you have selected from the **SLOS Results** grid.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

- c. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for SLOS Testing services will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.
- d. **Back** – returns you to the previous screen in SIS discarding any unsaved information.
- e. **Next** – moves to Enter PSR – Karyo screen.

Enter PSR – US (Ultrasonography)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - US

The **Enter PSR - US** screen (**FIGURE 1**) allows you to enter information for Ultrasonography service(s) provided by your PDC. You may navigate to this screen or other PSR screens by:

- 1) Clicking the **Next** button to progress through the PSR screens, or
- 2) Selecting an Ultrasonography service record from the service grid on the Enter PSR screen and clicking the **Modify Service/ Review Results** button.

Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

FIGURE 1

Ultrasonography - 1st Trimester Referral

Ultrasound Services: ☐ Provided ☐ Declined ☐ Not Indicated ☐ Not Authorized

Date Ultrasound Provided: - -

Name of Provider:

2nd opinion ultrasound:

PDC code of referring PDC for 2nd opinion ultrasound:

Name of referring PDC:

Service	Status	Date	Provider
Ultrasound	Provided	05/26/2008	Filkins, Karen

1. Navigation and screen name.
2. Client information is displayed in a read-only format based on the client profile. The label displays trimester information.
3. **Ultrasonography** information: You must select a radio button in the **Ultrasound Services** field to indicate which (if any) services were "Provided", "Declined", "Not Indicated" or "Not Authorized". You must select the appropriate button for the Ultrasound Service Status and add a record to the grid by clicking on the **Add to Grid** button before moving on to the next PSR screen.

Enter PSR – US (Ultrasonography) (continued)

4. **Date Ultrasound Provided** must be entered if the radio button for “Provided”, or “Not Authorized” is selected for Ultrasound Service.
5. **Name of Provider** must be selected from the dropdown if “Provided” or “Not Authorized” is selected for Ultrasound Services.

FIGURE 2

GDB-SIS

Data Intake » Case Summary (PNS) » Enter PSR - US

Update Case (PNS) | Case Notes | Link PNS Cases | Re-assign CCC | Tracking Events
 Appointments | Services History | Enter PSR | Link Client to Entity | Unlink Specimens
 GA Calculator

Back | Next

Client Name: AARONS, SHANNON | Date of Birth: 8/7/1963
 Accession Number: 189-78-141/A -2008-64

Ultrasonography - 1st Trimester Referral

Ultrasound Services: ☐ Provided ☐ Declined ☐ Not Indicated
☐ Not Authorized

Date Ultrasound Provided: [MM] [DD] [YY] [Time]

Name of Provider: (6a)

2nd opinion ultrasound: (6b)

PDC code of referring PDC for 2nd opinion ultrasound: (6c)

Name of referring PDC: (7)

Add to Grid | Update | Cancel

	Service	Status	Date	Provider
8	<input type="radio"/> Ultrasound	Provided	05/26/2008	Filkins, Karen

Edit | Delete (9)

6. 2nd Opinion Ultrasound

- a. 2nd Opinion Ultrasound should be answered “Yes” or “No”. 2nd Opinion Ultrasound requires a special authorization by GDB staff.
- b. If 2nd Opinion Ultrasound is “Yes”, then you need to enter the PDC Code of the referring PDC for 2nd Opinion Ultrasound.
- c. The Name of the PDC will be populated based on the entered PDC Code of the referring PDC.

7. Buttons

- a. **Add to Grid** – adds the Ultrasound information you have entered to the Ultrasound service grid.
- b. **Update** – allows you to save changes to an existing record (a row in the Ultrasound grid). After you have selected a record for editing (see 6a), the **Update** button will become available.

Enter PSR – US (Ultrasonography) (continued)

- c. **Cancel** – clears the entered information in the Ultrasound fields (3, 4, 5, 6a, 6b, 6c), discarding any unsaved information.
8. The service grid lists the details of Ultrasonography service(s) that were entered by you. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.
9. **Buttons:**
 - a. **Edit** – populates the information for the selected service record in the Ultrasonography fields allowing you to edit the existing information.
 - b. **Delete** – allows you to delete a service record you have selected from the Ultrasound service grid.

FIGURE 3

Ultrasonography

Fetus (Letter): A mm

Bi-Parietal Diameter (BPD): Select

Ultrasound Result: Select

Fetal Abnormality by Anatomical Category: Select

Specific Fetal Abnormality: Select

Other Abnormality- Please Specify:

Add to Grid Update Cancel

Fetus (Letter)	BPD (mm)	Result	Abnormality

Edit Delete

Changes in Interpretation Factor During Ultrasound

Interpretation factor which changed during ultrasound: Select

If Interpretation changed during ultrasound, indicate final interpretation: Select

Save Back Next

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10. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the Ultrasound results grid.
11. Enter the **Bi-Parietal Diameter (BPD)** in millimeters. If you attempt to add a record to the results grid without indicating the BPD, you will receive a warning "Bi-Parietal Diameter is not entered. Do you want to continue?" You may continue by clicking the **OK** button. The range of millimeters is 16-78. You should enter a BPD for each fetus.

Enter PSR – US (Ultrasonography) (continued)

12. Ultrasound Result

- a. **Ultrasound Result** must be selected if the radio button for “Provided” or “Not Authorized” is selected for Ultrasound service. If “Other Ultrasound Abnormality” is selected under **Ultrasound Result** then proceed to **Fetal Abnormality by Anatomical Category**.

- b. **Fetal Abnormality by Anatomical Category** is divided into the following categories:

Central Nervous System	Face	Neck
Heart/Lung	Abdomen	Skeletal System
Kidney/Urinary	Bladder/Pelvis	Size
Growth	Overall Appearance	Placenta
Amniotic Fluid Volume	Umbilical Cord	

You select one of these categories at a time then proceed to select the specific fetal abnormality.

- c. **Specific Fetal Abnormality** is a list of abnormalities within that specific anatomical category. For example, under Fetal Abnormality by Anatomical Category - Heart/Lung the specific fetal abnormality Atrial Septal Defect (ASD) can be selected. (See the complete list of Anatomical Categories under the Specific fetal abnormality listed under each category).

13. Buttons:

- a. **Add to Grid** – adds the Ultrasonography results you have entered to the service grid.
- b. **Update** – allows you to save changes to an existing record (a row in the Ultrasound grid). After you have selected a record for editing (see 16 below) the **Update** button will become available(3, 4, 5, 6a, 6b, 6c).
- c. **Cancel** – clears the entered information in the Ultrasonography result fields discarding any unsaved information.

14. Ultrasonography Results grid.

15. Buttons:

- a. **Edit** – populates the information for the selected result record into the results fields allowing you to edit the existing information.
- b. **Delete** – allows you to delete a result record you have selected from the Ultrasound results grid.
- c. **Save** - saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Ultrasonography service will be displayed at the top of the screen.

Enter PSR – US (Ultrasonography) (continued)

The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC.

Inconsistencies should be corrected before the PSR is submitted to GDB.

- d. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.
- e. **Next** – moves you through each service screen

16. **Changes in Interpretation factors during Ultrasound (visible to second Trimester cases only):**

- a. Check the boxes to indicate the interpretation factor(s) that changed during ultrasound. Multiple checks are allowed. If you are updating information be sure to uncheck any boxes that do not apply.

Note: checking these boxes will not update any information on the Case Summary. You must contact the Case Coordination Center (CCC).

- b. **If Interpretation changed during Ultrasound, indicate final interpretation** by selecting “Negative” or “Too Early” or “Too Late” or “Other Screen Positive” or “Too Early-High AFP” or “Pregnancy Not Screenable” or “Too Late-High AFP”. Use this only if the interpretation changed during Ultrasound.

Enter PSR – US (Ultrasonography) (continued)

FIGURE 3

Changes in Interpretation Factor During Ultrasound

Interpretation factor which changed during ultrasound: 10 ☐ Number of Fetuses ☐ Gestational Age

If Interpretation changed during ultrasound, indicate final interpretation: 11 Select

Results Determined From Services

Ultrasonography

Fetus (Letter): 12 ☐ A

Bi-Parietal Diameter (BPD): 19 mm 13

Ultrasound Result: Select

Fetal Abnormality by Anatomical Category: Select

Specific Fetal Abnormality: Select

Add to Grid Update Cancel

Select Fetus (Letter)	BPD (mm)	Result	Abnormality
<input checked="" type="radio"/> A	19	No Abnormality on Ultrasound for the Fetus/Pregnancy	

Edit Delete
Save Back Next

17. Check the boxes to indicate the interpretation factor(s) that changed during ultrasound. Multiple checks are allowed. If you are updating information be sure to uncheck any boxes that do not apply.

Note: checking these boxes will not update any information on the Case Summary. You must contact the Case Coordination Center (CCC).

18. **If Interpretation changed during Ultrasound, indicate final interpretation** by selecting “Negative” or “Too Early” or “Too Late”. Use this only if the interpretation changed during Ultrasound.
19. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the Ultrasound results grid.
20. Enter the **Bi-Parietal Diameter (BPD)** in millimeters. If you attempt to add a record to the results grid without indicating the BPD, you will receive a warning “Bi-Parietal Diameter is not entered. Do you want to continue?” You may continue by clicking the **OK** button. The range of millimeters is 16-78. You should enter a BPD for each fetus.

Enter PSR – US (Ultrasonography) (continued)

FIGURE 4

Changes in Interpretation Factor During Ultrasound

Interpretation factor which changed during ultrasound: ☐ Number of Fetuses ☐ Gestational Age

If Interpretation changed during ultrasound, indicate final interpretation:

Results Determined From Services

Ultrasonography

Fetus (Letter): ☐ A

Bi-Parietal Diameter (BPD): mm

Ultrasound Result:

Fetal Abnormality by Anatomical Category:

Specific Fetal Abnormality:

Select Fetus (Letter)	BPD (mm)	Result	Abnormality
C	A	19	No Abnormality on Ultrasound for the Fetus/Pregnancy

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21. Ultrasound Result

- Ultrasound Result** must be selected if the radio button for “Provided” or “Not Authorized” is selected for Ultrasound service. If “Other Ultrasound Abnormality” is selected under **Ultrasound Result** then proceed to **Fetal Abnormality by Anatomical Category**.

- Fetal Abnormality by Anatomical Category** is divided into the following categories:

Central Nervous System	Face	Neck
Heart/Lung	Abdomen	Skeletal System
Kidney/Urinary	Bladder/Pelvis	Size
Growth	Overall Appearance	Placenta
Amniotic Fluid Volume	Umbilical Cord	

You select one of these categories at a time then proceed to select the specific fetal abnormality.

- Specific Fetal Abnormality** is a list of abnormalities within that specific anatomical category. For example, under Fetal Abnormality by Anatomical Category - Heart/Lung the specific fetal abnormality Atrial Septal Defect (ASD) can be selected. (See the complete list of Anatomical Categories under the Specific fetal abnormality listed under each category).

Enter PSR – US (Ultrasonography) (continued)

FIGURE 5

Changes in Interpretation Factor During Ultrasound

Interpretation factor which changed during ultrasound: ☐ Number of Fetuses ☐ Gestational Age

If Interpretation changed during ultrasound, indicate final interpretation:

Results Determined From Services

Ultrasonography

Fetus (Letter): ☐ A

Bi-Parietal Diameter (BPD): mm

Ultrasound Result:

Fetal Abnormality by Anatomical Category:

Specific Fetal Abnormality:

15

16	Select Fetus (Letter)	BPD (mm)	Result	Abnormality
	C A	19	No Abnormality on Ultrasound for the Fetus/Pregnancy	

17

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22. Buttons:

- d. **Add to Grid** – adds the ultrasonography results you have entered to the service grid.
- e. **Update** – allows you to save changes to an existing record (a row in the Ultrasound grid). After you have selected a record for editing (see 16 below) the **Update** button will become available (3, 4, 5, 6a, 6b, 6c).
- f. **Cancel** – clears the entered information in the Ultrasonography result fields discarding any unsaved information.

23. Ultrasonography Results grid.

24. Buttons:

- f. **Edit** – populates the information for the selected result record into the results fields allowing you to edit the existing information.
- g. **Delete** – allows you to delete a result record you have selected from the Ultrasound results grid.

Enter PSR – US (Ultrasonography) (continued)

- h. **Save** - saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Genetic Counseling services will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC.

Inconsistencies should be corrected before the PSR is submitted to GDB.

- i. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.
- j. **Next** – moves you through each service screen.

Entity Profile

Entity >> Entity Profile

The **Entity Profile** screen is used to view and edit information about an entity in SIS. The fields displayed in the Entity Profile screen depend upon the Entity Type. For example, when viewing a PDC-type entity the Organization Name field is displayed whereas, when viewing a person-type entity, the person's First Name and Last Name are displayed.

You can navigate to the **Entity Profile** screen by searching for an entity on the Entity Search screen by clicking the radio button next to the entity record and clicking the View Entity Profile button. Following is an example of one entity type.

Entity Profile (continued)

FIGURE 1

Entity Search
Entity Profile

Entity » Entity Profile

Address/Phone
Entity Services

Entity Relation
Merge Entities

Maintain CEU's
Cond for PDC Approval

License
NT Practitioner Data

Certification

PDC

* Entity ID: 1170086

* Entity Type: Prenatal Diagnosis Center (PDC)

Entity Code: 75c

* Organization Name: Kaiser Permanente - Northern California

AKA: Oakland

* PDC Type: Comprehensive

Clinic Schedule: Tues, every other Wed(PM), Thursday

Provides CVS: ☐

Federal Tax ID: 94-2728480

NPI Number:

PDC Owner: K.P.M.C.

Profit Status: Unknown

Responsible Department: Dept of Genetics

Mailing List Type:

☐ MS/MS Auxiliary
☐ Other NBS Auxiliary
☐ Metabolic
☐ Endocrine
☐ Hemoglobin

Notes:

Entity Status: Active

Effective Start Date: 01-01-1901

Effective End Date:

Back Edit

Address and Telecom Information:

Contact Type	Address	Telecom Information	Program Area	Address Status	NAPS Lab
Genetic Counseling	280 W Macarthur Blvd Oakland CA 94611 5642	(510) 752-6298 (Office Phone Number) , (510) 752-6298 (Appointment Phone Number) , (510) 412-1562 (Secure Fax Number)	PNS	Active	ALLIED LABORATORY

The entity type is displayed at the top of the screen.

1. When the Entity Profile screen is initially loaded, information about the entity is displayed in read-only mode.
2. The new check box "Provides CVS" is displayed here. This field ensures whether the PDC will provide CVS or not.
3. Click the **Edit** button to make changes to the entity information (see **FIGURE 2**).
4. **Address and Telecom Information** grid displays contact information. To update address or telecom information, use the View Address 3rd level link at the top of the screen.

Entity Profile (continued)

FIGURE 2

PDC

* Entity ID: 113

* Entity Type: Prenatal Diagnosis Center (PDC)

Entity Code: 75e

* Organization Name: Kaiser--San Francisco

AKA:

* PDC Type: Comprehensive

Clinic Schedule:

Federal Tax ID: 1

PDC Owner:

Profit Status: Select

Mailing List Type:

Notes:

Entity Status: Active

Effective Date:

Save Cancel

Address and Telecom Information:

Contact Type	Address	Telecom Information	Program Area	Address Status
Physical Location	2425 Geary Blvd San Francisco CA 94115		PNS	Active

5. Update the information for the entity in the fields provided.

Note: Certain entity types have fields related to license information. For information about the format requirements for License Number entries, refer to Appendix G – License Number Format Structure.

6. **Buttons:**

- a. Click the **Save** button to save the changes you made to the entity profile.
- b. Click the **Cancel** button to return to the entity profile in read-only mode discarding any unsaved information.

Entity Relationships

Entity >> Entity Profile >> Entity Relation

The **Entity Relation** screen is used to view all existing relationships for an entity. From this screen the user can navigate to the Maintain Relationships screen where entity relationships can be created and edited. A relationship indicates a connection or link between two entities, two clients or an entity and a client. For example:

- Entity/Entity <-> Hospital/Clinician
- Client/Client <-> Parent/Child
- Entity/Client <-> Physician/Client

Note: SIS restricts the type of entity relationships that can be created. For more information on Entity Relationships, see Appendix F - Entity Relationship Matrix.

FIGURE 1

Entity >> Entity Profile >> Entity Relation

Address/Phone Entity Relation Maintain CEU's License Certification
Entity Services Merge Entities Cond for PDC Approval NT Practitioner Data

Entity - View Relationships

Entity ID: 11244501 Entity Code: NT002
Entity Name: deb, samrat

Name: samrat deb
Entity Type: Person
Entity Code: NT002
Medical License Number:

Create New User

Current Relationships

	Entity	Address	Role	Relation	Entity To	Contact Type	Address (Entity To)	Status	Updated By	Last Updated
<input type="radio"/>	samrat deb		NT Practitioner	Works for	California NT			Active	msc	3/7/2008

1. Information about the selected entity is displayed in a read-only format based on the entity profile.
2. The user can create relationships for NT Practitioners, e.g. in this case the entity is a NT practitioners and the user can create a relationship for it.
3. Any existing relationships are displayed in the **Current Relationships** grid.
4. Click the radio button next to a current relationship to select it for editing.
5. Click on Create New User button to navigate to the Create New User screen, where you can create a new user for the selected entity.

Entity Relationships (continued)

FIGURE 2

☐ Create Relationship without an Address (8)

To Create New Relationship, Select One Address (6)

Address	Contact Type
<input type="radio"/> Address City CA 94538	Physical Location

(7)

(9) Submit Cancel

6. In order to create a new relationship for an entity an address must exist for the entity. All address records for the selected entity are displayed in the **To Create New Relationships, Select One Address** grid.
7. Click the radio button next to the desired address to select it as the address for creation of a new relationship.
8. When you check the checkbox “Create Relationship without an Address”, the address in the below grid becomes read only. After that if you click on submit button, then it will navigate to the Maintain Relationships screen, where you can create a new relationship for the selected entity without an address
9. **Buttons:**
 - a. Click the **Submit** button with an address selected to navigate to the Maintain Relationships screen where you can create a new relationship for the selected entity. Click the Submit button with a current relationship selected to edit the selected relationship.
 - b. Click the **Cancel** button to cancel the current action.

Entity Search

Entity >> Entity Search

The **Entity Search** screen is used to locate a particular entity in SIS. The user can navigate to this screen directly by clicking on the Entity module tab. In addition, this screen is displayed in a separate Internet Explorer window when the user clicks on a Search for Entity link from within another screen.

FIGURE 1

Search For

Entity ID:

Entity Type: Prenatal Diagnosis Center (PDC)

Program Area:

Entity Code:

NBS Collection Facility Code:

Organization Name: Kaiser--San Francisco

AKA:

First Name:

Last Name:

Entity Status:

Professional Role:

License Type:

License:

Certification Type:

Certification:

Contact Type:

Address (Number , Street):

Address (Apt / Suite #):

City:

State:

Zip:

☐ Do not validate address

Telecom Number: - - Ext. :

Address Status:

Mailing List Type:

Special Care/Follow-up Center Type:

Kaiser Affiliation:

Search for: ☐ Partial ☐ Phonetic

Search Results

Entity Type	Entity Code Name	AKA	Address Type	Address	Telecom Number	Licence Number
<input type="radio"/>	Prenatal Diagnosis Center (PDC)	75e	Kaiser--San Francisco	Physical Location	2425 Geary Blvd San Francisco CA 94115 3358	

1. Enter any information you know about the entity in the **Search For** fields. You must enter at least two search criteria.

Entity Search (continued)

FIGURE 2

39297:qaadmin
01/11/2005
15:37:41.200

Address (Apt / Suite #):
City:
State: Select
Zip: -
☐ Do not validate address
Telecom Number: - - Ext. :
Address Status: Select
Mailing List Type: Select
Special Care/Follow-up Center Type: Select
Kaiser Affiliation: Select
Search for: ☐ Partial ☐ Phonetic

2 Search Clear Cancel

3 Search Results

	Entity Type	Entity Code	Name	AKA	Address Type	Address	Telecom Number	Licence Number
4 <input type="radio"/>	Prenatal Diagnosis Center (PDC)	75e	Kaiser--San Francisco		Physical Location	2425 Geary Blvd San Francisco CA 94115 3358		

5 Add New Entity View Entity Profile Find Potential Match

2. Buttons:

- Click the **Search** button to perform a search based on the criteria you entered.
- Click the **Clear** button to clear the Search For fields.
- Click the **Cancel** button to cancel a search in progress.

3. Search Results grid displays all entity records matching the search criteria.

4. Click the radio button next to an entity record to select it.

5. Buttons:

- Click the **Add New Entity** button to create a new entity record.
Note: You must perform an entity search before you can enter a new entity record.
- Click the **View Entity Profile** button to display the Entity Profile screen for the selected entity.
- Click the **Find Potential Match** button to display the Merge Entities screen for the selected entity.

Entity Services

Entity >> Entity Profile >> Entity Services

The **Entity Services** screen is used to view, create and update services for an entity. Services are tracked for entities that are "Other Laboratories"; however SIS will allow you to enter service information for any entity type. The types of Services that can be added for Other Laboratories are:

- CF - Molecular Genetic Testing
- CF - Sweat Testing
- CF - IRT Testing
- MS/MS Testing

FIGURE 1

Entity Search
Entity Profile

3529::qaadmin
01/12/2005
18:44:08.657

Entity >> Entity Profile >> Entity Services

View Address	Entity Relation	Maintain CEU's	License	Certification
Entity Services	Cond for PDC Approval			

Entity ID: 3570 Entity Code: 15
Entity Name: Kennedy-Krieger

Current Services assigned to

Service	Effective From	Service Status
<input type="radio"/> CF-Molecular Genetic Testing	01-12-2005	Active

Add Edit

1. Information about the entity is displayed in a read-only format. To update this information you must use the Entity Profile screen.
2. Existing services assigned to the entity are displayed in the **Current Services assigned to** grid.
3. Click the radio button next to the service to select it for editing.
4. **Buttons:**
 - a. Click the **Add** button to add a new service for the selected entity.
 - b. Click the **Edit** button to make changes to the selected service.
 - c. As part of **PEII** change, NT Practitioner data is editable only if the login user has "**Allow NT**" special permission. If the special permission is not provided for the user, **Add** and **Edit** buttons are disabled on the screen for NT Practitioner data.

Entity Services (continued)

FIGURE 2

Entity Search
Entity Profile

Entity » Entity Profile » Entity Services

View Address Entity Relation Maintain CEU's License Certification

Entity Services Cond for PDC Approval

Entity ID: 3570 Entity Code: 15
Entity Name: Kennedy-Krieger

Enter/edit Service Information

* Service: CF-Molecular Genetic Testing

* Effective From: 01-12-2005

Service Status: Active

Save Clear Cancel

Current Services assigned to

Service	Effective From	Service Status
CF-Molecular Genetic Testing	01-12-2005	Active

Add Edit

5. Enter service information for the entity. **Service** and **Effective From** are required fields.
6. **Buttons:**
 - a. Click the **Save** button to save the new service record with the information you entered in the fields above.
 - b. Click the **Clear** button to clear the information you have entered discarding any changes you made.
 - c. Click the **Cancel** button to return to the previous screen discarding any changes you made.

Note: If you click the Add button instead of the Edit button the fields will be empty. After clicking Save a row will be added to the Current Services assigned to grid.

Expected Recall (NBS)

Data Intake >> Expected Recall (NBS)

The **Expected Recall NBS** screen displays a list of all newborn screening accession numbers that are expecting a recall statewide. This screen will be used at the Genetic Disease Laboratory only. For each accession number, one row will be displayed per disease for which a recall is expected. Early and missing cases will also be displayed as a separate row. You can click on the accession number link of a disease to enter the recall test results.

Accession Number	Last Name, First Name	Date of Collection	Gender	Date of Birth	Interpretation	CCC	Initial Positive Test Result
307-87-018/21-2004-72	FRANK, EDWARD	10/28/2004	Male	10/27/2004	HB Hb Positive	Kaiser South	
308-51-148/21-2004-22	BRYANT	11/01/2004	Male	10/31/2004	HB Hb Positive	Kaiser South	
309-33-171/21-2004-11	JAMES, DOMINICK	10/31/2004	Male	10/28/2004	PKU PKU POSITIVE	Kaiser South	
310-67-095/21-2004-22	WILLIAMSON	11/02/2004	Female	10/30/2004	PKU PKU Positive	Kaiser South	
310-90-002/21-2004-72	JACKSON, VENUS	11/03/2004	Female	11/02/2004	PKU PKU POSITIVE	Kaiser South	
314-23-095/21-2004-12	JONES, BRIAN	11/07/2004	Male	11/06/2004	TSH TSH Positive	Kaiser South	
314-58-047/21-2004-32	FELLOWES, ERIN	11/05/2004	Female	11/04/2004	TSH TSH Positive	Kaiser South	
315-07-075/21-2004-71	MALLORY,	11/09/2004	Male	11/03/2004	HB Hb Positive	Kaiser South	

1. The **Expected Recall NBS** grid displays a list of all accessions numbers that are expecting a recall statewide.
2. Click an **Accession Number** link to navigate to the Additional Test Results screen, where you can enter additional test results.
3. The **Interpretation** column displays the interpretation for the case.
4. The **CCC** field shows the Case Coordination Center to which the case is assigned.

GA Calculator

Data Intake>>Case Summary (PNS) >> GA Calculator

This screen allows you to calculate GA and days difference for a specimen based on current GA details and the information entered by the user. This screen serves as a calculator and does not save any data.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Case Summary (PNS) >> GA Calculator

Update Case (PNS) Adequacy Status (PNS) Case Notes Link PNS Cases Re-assign CCC
 Tracking Events Appointments Services History Enter PSR Link Client to Entity
 GA Calculator ①

Client Name: SIMON, PAULA Date of Birth: 7/4/1975

②

	Accession Number	BCD	Interpretation
<input type="radio"/>	123-44-254/A-2007-12	05/13/2007	Combined Risk Superseded by Integrated Risk
<input type="radio"/>	225-99-111/P-2007-12	06/14/2007	Full Integrated Screen Positive for T21

Select ③

1. Client information displays in read only mode .If there is only 1 valid specimen in the case, then Accession Number displays in the header section. If there are more than 1 valid specimen in the case, then displayed after user selects one of them.
2. Displays a list of all valid specimens in the case including 'Too Early High AFP' and 'Too Late High AFP' if there are no other valid 2nd Trimester specimens.
3. Select button allows you to view the GA details of the selected accession number

GA Calculator (Continued)

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Case Summary (PNS) >> GA Calculator

Update Case (PNS) Adequacy Status (PNS) Case Notes Link PNS Cases Re-assign CCC
 Tracking Events Appointments Services History Enter PSR Link Client to Entity
 GA Calculator

Client Name: SIMON, PAULA Date of Birth: 7/4/1975
 Accession Number: 123-44-254/A-2007-12

	CURRENT	NEW
Dating Method Selected	Ultrasound	PDC Ultrasound
Date of Selected dating method	05/25/2007	07 - 14 - 2007
GA on that date (Weeks)	9	13
GA on that date (Days)	4	3
Blood Collection Date	05/13/2007	
GA at Collection	14 wks 3 days	15 wks 4 days
GA today	17 wks 3 days	18 wks 3 days
Case becomes 10 weeks 0 days	06/15/2007	06/22/2007
Case becomes 13 weeks 6 days	07/12/2007	07/19/2007
Case becomes 15 weeks 0 days	07/20/2007	07/27/2007
Case becomes 20 weeks 0 days	08/24/2007	08/31/2007
Case becomes 24 weeks 0 days	09/21/2007	09/28/2007

Days Difference: 8 days

Calculate

4. Displays current dating method information for the selected Accession number and editable fields for the user to enter the data
5. Displays current and new GA information in separate columns.
6. Difference between New GA Today and Current GA Today.
7. Calculate button allows to you to view the GA changes based on the information entered by the user.

Generate Audit Cases

Monitor >> Schedule Site Visits >> Generate Audit Cases

The **Generate Audit Cases** screen is used to select cases for review during a follow-up center site visit. Once a site visit has been scheduled (from the Schedule Site Visits screen) and the cases to be reviewed have been selected, you can print the case documentation for the site visit. An Alert will be generated for the follow-up center notifying them 30 days prior to the site visit.

The case characteristic selection criteria to generate the audit cases for Metabolic Centers are as follows:

- PKU and PKU Variant Diagnosed Cases
- Galactosemia and galactosemia variant Diagnosed Cases
- MS/MS Diagnosed Cases

The case characteristic selection criteria to generate the audit cases for Prenatal Diagnosis Centers (PDCs) are as follows:

- NTD History patients
- Rx History patients
- Down syndrome patients
- Down syndrome patients with amniocentesis declined
- Down syndrome Too Early patients
- Down syndrome Too Late patients
- Down syndrome corrected to negative by ultrasound
- Correction in the genetic counseling session patients
- NTD patients with amniocentesis provided
- NTD patients with amniocentesis declined
- NTD too late patients
- NTD patients corrected to negative
- Trisomy 18 patients with amniocentesis provided
- Trisomy 18 patients with amniocentesis declined
- Patients with significant Ultrasound abnormalities (i.e.—NTDs)
- Patients with any chromosomal abnormality
- Elevated AF-AFP patients

Generate Audit Cases (continued)

FIGURE 1

Monitor >> Schedule Site Visit >> Generate Audit Cases

Date of Visit: 03/01/2003

Entity Code: 75f

Organization Name: Kaiser--San, Rafael

* No of Patient Records per criteria (if available): 1-5

Date From: 01-01-2003 To: 01-10-2003

Comments on Patient Selected:

Search Back View Audit List

Search Results

Add to Audit	Selection Criteria	Accession Number	Patient Name	Date of Service	Date Of Birth	PDC Medical Record Number	Genetic Counselor	Comment
<input type="checkbox"/>	Correction in the genetic counseling session patients	001-05-233/P - 2003-22	DOE, JANE	1/3/2003	01/01/1982		Smith, John	
<input type="checkbox"/>	Correction in the genetic counseling session patients	001-61-025/P - 2003-22	DOE, MARY	1/3/2003	01/01/1982		Smith, John	
<input type="checkbox"/>	Correction in the genetic counseling session patients	001-67-216/P - 2003-22	DOE, JUDY	1/3/2003	01/01/1982		Smith, John	

Print Documentation for Selected Cases Update Audit List Send to Follow-up Center

1. Navigation and screen name.
2. Information about the site visit, including the **Date of Visit**, **Entity Code (A.K.A. PDC Code; Follow-up Center Code)** and **Organization Name** is displayed in a read-only format based on the site specified in the Schedule Site Visits screen.
3. Select the **No of Patient Records per criteria (if available)** to specify how many patient records matching a given criteria (see list on previous page) within the date range specified will be returned in the **Search Results** grid. The purpose of this field is to increase or decrease the number of records that are returned for any one criteria, allowing you to select a representative cross-section of cases for the site visit. This is a required field denoted by the (*).
4. Select the date range for the case search by selecting the **Date From** and **To**.
5. Enter any comments you have for the selected case in the **Comments on Patient Selected** field. After you select cases for the audit list, the comments you enter here will be displayed in the **Comments** column of the **Search Results** grid for each of the selected cases.

Generate Audit Cases (continued)

FIGURE 2

Monitor >> Schedule Site Visit >> Generate Audit Cases

Date of Visit: 03/01/2003
 Entity Code: 75f
 Organization Name: Kaiser--San, Rafael
 * No of Patient Records per criteria (if available): 1-5
 Date From: 01-01-2003 To: 01-10-2003

Comments on Patient Selected:

Search Results

Add to Audit	Selection Criteria	Accession Number	Patient Name	Date of Service	Date Of Birth	PDC Medical Record Number	Genetic Counselor	Comment
<input type="checkbox"/>	Correction in the genetic counseling session patients	001-05-233/P - 2003-22	DOE, JANE	1/3/2003	01/01/1982		Smith, John	
<input type="checkbox"/>	Correction in the genetic counseling session patients	001-61-025/P - 2003-22	DOE, MARY	1/3/2003	01/01/1982		Smith, John	
<input type="checkbox"/>	Correction in the genetic counseling session patients	001-67-216/P - 2003-22	DOE, JUDY	1/3/2003	01/01/1982		Smith, John	

6. Buttons:

- Click the **Search** button to search for patient records with the specified search criteria.
- Click the **Back** button to return to the Schedule Site Visit screen.
- Click the **View Audit List** button to view all cases that have been previously selected for the site visit identified.

7. All patient records matching the search criteria will be displayed in the **Search Results** grid.

8. Click the **Add to Audit** checkbox next to a patient case record to select it for inclusion in the Audit List.

9. Buttons:

- Click the **Update Audit List** to add the selected cases to the set of cases to be audited during the site visit. All unselected cases will be removed from the Search Results grid.
- Click the **Print Documentation for Selected Cases** button to print all of the case-specific documentation for the cases that were selected for auditing.

Generate Audit Cases (continued)

- c. Click the **Send to Follow-Up Center** button to send an alert to the follow-up center notifying them that a site visit has been scheduled and they may view a list of the cases that will be examined for this audit.

Note: The aforementioned alert only applies to PDC's, not Metabolic Centers or SCCC's.

Headline Cases (NBS)

CCC >> Headline Cases (NBS)

The **Headline Cases (NBS)** screen is used by NBS Case Coordinators to view all active cases assigned to their Case Coordination Center (CCC). This screen is displayed to CCCs by default on login. This includes positives, inadequates, earlies, transfused, missing results (MRs), Out of Hospital births (OHs), Not Obtained Specimens (NOs) among others. You can view and sort the cases, and access case or client information by clicking on one of the hyperlinks in the Headline Case grid.

This is the only screen from which you can access the Set Case Alerts screen to manually add an alert to a case.

You can bypass this screen by clicking on any of the module tabs.

FIGURE 1

Status	Date Downloaded	Last Name	Twin Sex	Date Of Birth	Unique Identifier	Interpretation	Adequacy	Tracking Status	Collected NBS Coll. Fac. Name & Code	Nursery ALERT
NEW	02/21/2007	KHAN		Female 06/02/2007	153-67-014/21-2007-72		A	Contact Clinician	EARLY STANFORD/LUCILE S PACKARD - R777	
NEW	02/21/2007	CABELLO		Male 10/13/2006	291-55-051/21-2006-12	BD Positive	A	Contact Clinician	ON TIME STANFORD/LUCILE S PACKARD - R777	Regular Nursery
NEW	02/20/2007	BERGER		Female 09/29/2006	275-54-131/21-2006-12		A	Contact Clinician	EARLY COLUMBIA GOOD SAMARITAN HOSPITAL - R570	NICU
NEW	02/20/2007	SAAVEDRA		Female 10/22/2006	297-98-074/21-2006-12	BD Transfuse; Uninterpretable because of transfusion; Transfused	A	Contact Clinician	ON TIME SALINAS VALLEY MEMORIAL HOSPITAL - R362	Regular Nursery
NEW	02/19/2007	LEE	B	Male 10/19/2006	297-31-163/21-2006-12	CFTR DNA Sequencing Referred	A	Contact Clinician	ON TIME JOHN MUIR MEMORIAL HOSPITAL - R043	NICU
NEW	01/03/2007	JAMESNIK		Male 10/22/2006	297-90-079/21-2006-12	GAL Positive	A	Matched	ON TIME ALTA BATES COMMUNITY HOSPITAL - R003	Regular Nursery

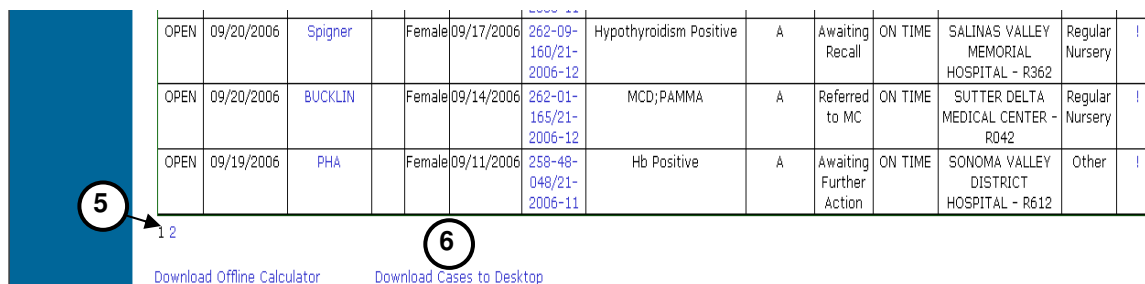
1. The number of headline cases that are assigned to the CCC but not yet downloaded by the CCC are shown in the cases waiting box. Click on the **Download New Cases** button to populate grid below.
2. Headline cases records can be sorted by clicking links in headline case data grid header area, or by selecting sorting criteria from dropdown boxes and clicking **Sort** button. For sorting, choose Primary, Secondary and Tertiary sorts by selecting fields from the dropdown boxes.
3. **Cancel:** Cancels operation.
4. Headline cases grid hyperlinks:
 - a. **Status:** Clicking on any of the hyperlinks does not change the "New" status to "Open" for the case. "New" status will be changed to "Open" only after user enters any Tracking Event for this case.
 - b. **Last Name:** If this hyperlink is clicked the View Client Profile screen is shown to the user.

Headline Cases (NBS) (continued)

- c. **Unique Identifier:** If the Unique Identifier hyperlink is clicked, the NBS Case Summary screen is shown to the user.
- d. **Alert:** The Alert icon (!) is displayed for each case row if there are any alerts for that case which can be viewed by the case coordinator. If the alert has been viewed the (!) will turn to "V!" for alert viewed. When clicking the alert icon, the "Get Case Alerts Page" is displayed.

The NBS Cases screen is typically a long screen. This screenshot captures the bottom of the page to show additional functionality.

FIGURE 2



OPEN	09/20/2006	Spigner	Female	09/17/2006	262-09-160/21-2006-12	Hypothyroidism Positive	A	Awaiting Recall	ON TIME	SALINAS VALLEY MEMORIAL HOSPITAL - R362	Regular Nursery	!
OPEN	09/20/2006	BUCKLIN	Female	09/14/2006	262-01-165/21-2006-12	MCD;PAMMA	A	Referred to MC	ON TIME	SUTTER DELTA MEDICAL CENTER - R042	Regular Nursery	!
OPEN	09/19/2006	PHA	Female	09/11/2006	258-48-048/21-2006-11	Hb Positive	A	Awaiting Further Action	ON TIME	SONOMA VALLEY DISTRICT HOSPITAL - R612	Other	!

1 2

[Download Offline Calculator](#) [Download Cases to Desktop](#)

5. There are 50 cases per page in this report. For additional pages, click on next page number shown below the grid.
6. Click on **Download Cases to Desktop** to generate an Excel spreadsheet of all headline cases.

Headline Cases (PNS)

CCC >> Headline Cases (PNS)

The **Headline Cases (PNS)** screen is used by Prenatal Case Coordinators to view all active cases assigned to their Case Coordination Center (CCC). You can view and sort the cases, and access the case or client information by clicking on one of the hyperlinks in the Headline Case grid.

The user can access the Set Case Alerts screen to manually add an alert to a case.

You can bypass this screen by clicking on any of the Module Tabs.

FIGURE 1

CCC >> Headline Cases (PNS)

Set Case Alerts

CCC Name: CEDARS-SINAI, OB/GYN-49

CCC Code: 49

Number of Cases: 126

Open Cases: 32

Closed Cases: 4

New Cases: 29

Action Cases: 3

W 2 T SP Cases: 1

Cases Waiting: 0

Cases Referred: 57

Download New Cases

Primary Sort: Select

Secondary Sort: Select

Tertiary Sort: Select

Cancel Sort

Status	ALERT	Downloaded Date	Last Name	First Name	Other HC?	Accession No	Interpretation	Tracking Status	Last Name of Provider	First Name of Provider	Facility	City	Phone No	View Form
OPEN		09/22/2008	SABASI	DIALAS	Yes	274-28-666/P - 2008-11	2nd T: Inadequate Specimen	Clinician agreed to redraw	LEE	JEFFERY		Glendora	(626) 914 - 4685	
WAITING FOR 2ND TRIMESTER SPECIMEN		09/22/2008	ABAD	CARLEY		254-17-484/A - 2008-11	1st T Combined: Screen Positive for T18	Patient elects refined risk instead of referral	GUPTA	NARENDRA		Glendora	(626) 914 - 1919	
NEW		08/18/2008	SABASI	DIALAS	Yes	277-48-588/P - 2008-11	2nd T Quad: Screen Positive for T21, T18, SLOS	Arrange Immediate Referral	LEE	JEFFERY		Glendora	(626) 914 - 4685	

1. **CCC Name** and **CCC Code** fields identify your facility information, based on your log in information.
2. **Cases Waiting** displays the number of new cases that have not yet been downloaded into the Headline Case grid. The **Download New Cases** button loads all waiting cases into the Headline Case grid.

Headline Cases (PNS) (continued)

FIGURE 2

CCC Name: CHILDRENS HOSPITAL CENTRAL CALIFORNIA-45
 CCC Code: 45
 Number of Cases: 129
 Open Cases: 17
 Closed Cases: 0
 New Cases: 37
 Action Cases: 1
 Waiting For 2nd Trimester Specimen: 0
 Cases Waiting: 7
 Cases Referred: 74

Download New Cases

Primary Sort: Select
 Secondary Sort: Select
 Tertiary Sort: Select

Cancel Sort

Status	ALERT	Downloaded	Last Name	First Name	Other HC?	Accession No	Interpretation	Tracking Status	Last Name of Provider	First Name of Provider	Facility	City	Phone No	View Form
OPEN		09/26/2007	BERRONES	CRYSTAL		267-38-075/P - 2007-21	Complete, Screen Positive; Increased risk for NTD	Clinician agreed to PDC referral	ARRATA	MICHAEL	FAMILY HEALTHCARE NETWORK	Porterville	(559) 781-7242	<input type="checkbox"/>
REFERRED		09/26/2007	LEWIS	DALILAH		267-77-003/P - 2007-21	Complete, Screen Positive; Increased risk for T21	PDC referral to site (14g)	ANDREWS	TODD	SOUTH BAKERSFIELD COMM HLTH CE	Bakersfield	(661) 835-1240	<input type="checkbox"/>
REFERRED		09/26/2007	SANCHEZ	EDITH		267-64-045/P - 2007-11	Complete, Screen Positive; Increased risk for T21	PDC referral to site (39s)	BLACKETER	BETHANY	LMG	Livingston	(209) 394-7913	<input type="checkbox"/>
REFERRED		09/26/2007	LEDESMA	JESUS		267-04-125/P -	Complete, Screen	PDC referral to	MARQUEZ	CAMILLA	OMNI WOMENS Medical Group	Fresno	(559) 438-	<input type="checkbox"/>

3. **W 2 T SP** displays the number of cases **awaiting for refined risk** that have not yet been downloaded into the Headline Case grid.
4. Use the sort dropdowns to sort the cases in the grid. If you select a **Primary**, **Secondary**, and **Tertiary** sort simultaneously, the cases in the Headline Case grid will be sorted in order by the Primary criteria, then Secondary, then Tertiary.
5. Clicking on any of these header titles will re-sort the data in the grid by that column.
6. Clicking on a **Last Name** link will display the View Client Profile screen for that client.
7. Clicking on an **Accession Number** link will display the pre PEI Case Summary (PNS) screen for a pre PE II case. It will display the post PEI Case Summary (PNS) if the case is a post PEI case.
8. **"Other HC?"** will be marked yes if there is another sample in the case that is in the Headline Case screen. This column will appear blank for Pre Go-Live cases.

HIPAA Information

Monitor >> Search HIPAA >> HIPAA Info

This screen allows you to create a new sample study, edit an existing sample study, and upload the associated data (accession or client numbers) file into SIS.

FIGURE 1

The screenshot shows the 'Monitor >> Search HIPAA >> HIPAA Info' screen. The left sidebar contains a list of navigation links. The main form area is titled 'HIPAA Info' and contains several input fields. Numbered callouts are placed over the form:

- 1** points to the * Date: field, which is a date picker set to 12-08-2003.
- 2** points to the * Study Name: field, which contains 'TestStudy'.
- 3** points to the * Name: field, which contains 'Marshall'.
- 4** points to the * PHI Description: field, which contains 'To test UE3'.

Other fields visible include * Study ID: (1), Contact Information for Person Receiving PHI (Address, City, State, Zip, Phone), * Specimen Used: (PNS), * Reason For Disclosure: (Permitted by client), and * Date of PHI Disclosure: (12-08-2003).

1. **Date** the sample study is created in SIS is a required field.
2. **Study Name** and **Study ID** are required fields. The Study Name and Study ID, in most cases, would exist in an alternate database being used by the GDB. These are used to link the study entered into SIS with an independent, 3rd party specimen tracking database.
3. **Contact Information for Person Receiving PHI:**
 - a. **Address Information:** SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
 - b. **Do not validate address** – Checking the box will deactivate the address validation feature.
4. **Name, PHI Description, Specimen Used, Reason for Disclosure, and Date of Disclosure** are required fields.

HIPAA Information (continued)

FIGURE 2

3446::gdb002
01/06/2005
15:20:41.827

Journal Name: TestJournal

Journal Volume:

Publication Date: - -

Title:

Author:

IRB Approval Number:

Comments:

Upload Sample File: C:\Documents and Settings Browse... 5

Type of Data: Both Accession Number and Client Number 6

7 Save Cancel

5. When you click the **Browse** button to Upload a Sample File, a “Choose File” popup window will be displayed, allowing you to find and select the file you want to upload (*.txt files only), and will insert the filepath into the field.
6. The **Type of Data** is a required field. You must indicate whether the upload file contains Accession Numbers, Client Numbers, or Both.
7. **Buttons:**
 - a. **Save** button adds a new study into SIS when creating a new sample study. When editing an existing study, saves the data and any changes into SIS.
 - To find an existing study to edit, use the Search HIPAA screen.
 - b. **Cancel** button cancels any unsaved changes, and directs you to the Search HIPAA screen.

Lab C of C (Confirmation of Contact)

Data Intake >> Lab CofC

Laboratories are required to report screen positive results for PKU, galactosemia, hypothyroidism, CAH, BD, MS/MS disorders or inadequate specimens directly to the CCC. Laboratories are required to document this contact in SIS. This documentation is referred to as a Laboratory Confirmation of Contact (Lab CofC).

Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS, if you enter data in these fields, you will be required to enter the information twice and then save to permanently save the data.

FIGURE 1

GDB-SIS

Data Intake >> Lab CofC

#Form Number: 2015311725

*Accession Number: 274 - 94 - 037 / 21 - 2006 - 72

Newborn Information

*Client Last Name: HOWARD

Client First Name: JESSICA

Multiple (A,B,C):

Address (Street, Number): 21 HUMMINGBIRD LANE

Address (Apt /Suite #): APT 208

City: VALLEJO

State: California

Zip: 94590

Mother Information

*Mother's Last Name: HOWARD

Mother's First Name: CHERYL

Mother's Middle Initial:

Mother's Maiden Name: HOWARD

Social Security Number:

Phone Number: 510 - 412 - 4444

Mother's Birth Date: 10 - 12 - 1971

1. **Form Number** will be pre-filled once you have clicked the **View** button.
2. Enter the **Accession Number**. This is a required field.
3. Click **View** button to populate the Lab C of C fields as follows:
 - a. If there is an active case in SIS for the Accession Number, the most current case information will be used to pre-fill TRF data in the Lab C of C fields. You will not be allowed to change this existing case information.
 - b. If there is one or more previous Lab C of Cs for the case, they will be displayed in a grid. You may select a previous Lab C of C in order to populate the new Lab C of C fields with existing data.

Lab Confirmation of Contact (continued)

- c. Note: If a case is not yet active (i.e. it is prior to 8:00 p.m. on the date of TRF data entry) you must use the TRF to enter the same data in the Lab C of C fields. You must use caution, as any changes made will override TRF data when the information is transferred to SIS after 8:00 p.m.
4. **Newborn Information/Mother Information (TRF Data):** Fill in using blank and dropdown boxes.

FIGURE 2

Newborn's Physician

Physician's Last Name:

Physician's First Name:

Physician's Address (Number, Street):

Physician's Address (Apt / Suite #):

Physician's City:

Physician's State:

Physician's Zip: -

Physician's Telephone Number: - - x

License Number of Physician:

Other Information

Type of Feeding Since Birth:

Specify, if other selected:

Race / Ethnicity:

<input checked="" type="checkbox"/> White	<input checked="" type="checkbox"/> Hispanic	<input type="checkbox"/> Black
<input type="checkbox"/> Chinese	<input type="checkbox"/> Japanese	<input type="checkbox"/> Korean
<input type="checkbox"/> Cambodian	<input type="checkbox"/> Laos	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Filipino	<input type="checkbox"/> Other Southeast Asian	<input type="checkbox"/> Native American
<input type="checkbox"/> Middle Eastern	<input type="checkbox"/> Asian East Indian	<input type="checkbox"/> Hawaiian
<input type="checkbox"/> Guamanian	<input type="checkbox"/> Samoan	<input type="checkbox"/> Unknown
<input type="checkbox"/> Other		

Specify, if other selected:

Is the Person English Speaking:

Primary Language:

If not Spanish then Primary Language:

Medi-Cal Number:

5. **TRF Data:** Any updates you make on this screen will take precedence over the TRF data that will be transferred to SIS at 8:00 p.m. on the same day the Lab C of C is entered.

Lab Confirmation of Contact (continued)

FIGURE 3

Specimen Collection Information

Gender of Newborn:	<input type="text" value="Female"/>	
Weight of Newborn:	<input type="text" value="3320"/>	grams
#Date of Birth of Newborn:	<input type="text" value="08"/> - <input type="text" value="27"/> - <input type="text" value="2006"/>	
#Birth Hour:	<input type="text" value="0832"/>	
#Date of Specimen:	<input type="text" value="08"/> - <input type="text" value="27"/> - <input type="text" value="2006"/>	
#Hour when specimen was taken:	<input type="text" value="1230"/>	
#Type of Specimen:	<input type="text" value="Heelstick"/>	
#Specify if other was selected above:	<input type="text"/>	
Initials of the Specimen Collector:	<input type="text" value="APG"/>	
Reason for Test - If collected at < 12 hours of age:	<input type="text" value="Not Provided"/>	
If Other, Specify:	<input type="text"/>	
#RBC Transfusion before Collection:	<input type="text" value="No"/>	
#If Yes, Date of Last Transfusion:	<input type="text"/> - <input type="text"/> - <input type="text"/>	
#If Yes, Time of Last Transfusion:	<input type="text"/>	
Reason For Test:	<input type="text" value="Initial Specimen"/>	
If Other Selected Above, Then Specify:	<input type="text"/>	
Medical Record Number:	<input type="text" value="32133453"/>	
Hospital Code:	<input type="text" value="K206"/>	
Facility Drawing Specimen:	<input type="text" value="KAISER-PANORAMA CITY"/>	
Nursery Type:	<input type="text" value="Other"/>	
If Other, Specify:	<input type="text" value="RI"/>	

6

- TRF Data: Any updates you make on this screen will take precedence over the TRF data that will be transferred to SIS at 8:00 p.m. on the same day the Lab C of C is entered.

Lab Confirmation of Contact (continued)

FIGURE 4

Confirmation Of Contact

Name of Person Calling:

Name of Person Receiving Call:

*Value Reported: **8**

Inadequacy Code:

Biotinidase:

Transferase:

TSH:

17-hydroxyprogesterone (17 OHP):

Cortisol:

Androstenedione:

(17 OHP+Androstenedione)/Cortisol Ratio:

MS/MS Disease Pattern:

*Phone Number of Person Calling:

Phone Number of Person Receiving Call:

Date of Telephone Contact:

Time of Telephone Contact:

Comments:

9

gaffney::N094
03/07/2007
14:27:52.513

7. **Confirmation of Contact:** The name of the person calling will be populated with the name of the person logged into SIS. However, you may change this information. Enter the name of the person receiving the call.

8. **Value Reported** is a required field. Make a selection from the dropdown box.

Note: Enter the values reported for the identified test results or select the appropriate MS/MS disease pattern.

Enter the remaining test information if available.

9. **Buttons:**

- a. **Save:** Saves the information to the Headline case screen as positive or inadequate.
- b. **Clear:** Clears all data from the form. If you have used the **View** button to populate the fields with data from a TRF that is already in SIS, fields with a read-only format will not be cleared.

License

Entity >> Entity Profile >> License

The **License** screen is used to view, create and update license information for an entity. Typically, license information will be tracked for “person-type” entities such as physicians or nurses; however SIS will allow you to enter license information for any entity type. See Appendix F for a list of required formats for various entity types.

FIGURE 1

Entity >> Entity Profile >> License

Address/Phone Entity Services	Entity Relation NT Practitioner Data	Maintain CEU's	License	Certification
Entity ID: Entity Name:	9405916 SMITH, ROBERT N	Entity Code:		

Summary of Licenses

Status	License Type	License Name/Number	Start Date	End Date
<input type="radio"/> Active	Medical Doctor - CA	C 019650	10-25-2001	

Add Edit

1. Displays information about the entity that is currently selected in a read-only format. To update this information you must use the **Entity Profile** screen.
2. **Summary of Licenses** grid displays existing license information for the selected entity. Click the radio button next to the license record to select it for editing.
3. **Buttons:**
 - a. Click the **Add** button to add a new license record for the selected entity (see **FIGURE 2**).
 - b. Click the **Edit** button to make changes to the selected license record (see **FIGURE 3**).

As part of **PEII** change, NT Practitioner data is editable only if the login user has "**Allow NT**" special permission. If the special permission is not provided for the user, **Add** and **Edit** buttons are disabled on the screen for NT Practitioner data.

License (continued)

FIGURE 2

Entity >> Entity Profile >> License

Address/Phone	Entity Relation	Maintain CEU's	License	Certification
Entity Services	NT Practitioner Data			

Entity ID: 9405916 Entity Code:

Entity Name: SMITH, ROBERT N

Enter/edit License Information

Status:

*License Type: (4)

*License Number:

*Start Date:

End Date:

Save Clear Cancel (5)

4. If you click the Add button (see 3), the License Information fields will be blank. **License Type**, **License Number** and **Start Date** are required fields.
 - a. If available, enter the license expiration date in the **End Date** field. If no value is entered SIS will automatically populate "12/31/9999".
 - b. The format for the **License Number** depends on the License Type that is selected. For example:
 - Medical Doctor – California
X #####
 - Registered Nurse
RN#####
5. **Buttons:**
 - a. Click the **Save** button to save the new license record. A new row will be added to the Summary of Licenses grid (see 2).
 - b. Click the **Clear** button to clear the information you have entered discarding any unsaved changes.
 - c. Click the **Cancel** button to discard any unsaved information and return to the previous screen.

License (continued)

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Entity Search
Entity Profile

Entity » Entity Profile » License

Address/Phone Entity Relation Maintain CEU's License Certification
Entity Services NT Practitioner Data

Entity ID: 9405916 Entity Code:
Entity Name: SMITH, ROBERT N

Enter/edit License Information

Status: Active
*License Type: Medical Doctor - CA
*License Number: C 019650
*Start Date: 10-25-2001
End Date:

Save Clear Cancel

Summary of Licenses

Status	License Type	License Name/Number	Start Date	End Date
Active	Medical Doctor - CA	C 019650	10-25-2001	

infassel:001
03/02/2008
10:00:00.000

6. If you click the Edit button (see 4), the License Information fields will display the existing license information. You can save changes to the existing information from this screen. See 5 for specific information about the License Information fields.

Appendix F - List Of License Type Formats:

License Type	Format
Medical Doctor – CA	A #####, B #####, C #####., etc
Medical Doctor - Nevada	NV #####
Registered Nurse	RN#####
Nurse Practitioner	NP #####, NPF#####
Certified Nurse Midwives	CNM ###(##)
Licensed Midwives	LM ####
Licensed Vocational Nurse	VN #####
Physician's Assistant	PA #####
Medical Military Personnel	Allow any format
Doctor of Osteopathy	20A ####
Accreditation Ultrasound (ACR)	Allow any format
Accreditation Ultrasound (AIUM)	Allow any format
California Lab Field Services	Allow any format
CLIA	Allow any format
Genetic Counselor	Allow any format
PhD Medical Geneticist	Allow any format
Unknown	Allow any format
Nurse Midwives	NMW ###(##)

Link Accession Numbers

Data Intake >> Case Summary (PNS) >> Link Accn Numbers

OR

Data Intake >> Case Summary (NBS) >> Link Accn Numbers

The **Link Accn Numbers** screen allows you to link two accession numbers. The most common uses of this screen include recalls and redraws. This screen provides the basic information for the two accession numbers side-by-side, in order to help you determine whether they should be linked.

Before allowing a link of the two accession numbers, SIS will automatically validate that the two numbers do not belong to different clients. Linked Accession Numbers must always have the same client. If SIS determines that they belong to different clients, the system will not allow them to be linked, and will display an error message. Additional conditions when SIS will not allow the accession numbers to be linked:

1. If the accession numbers are same
2. The accession numbers are already linked.
3. If the accession numbers have different program types.
4. If the program type is NBS and the difference between the accession dates is more than 32 weeks between the cases.

When you initially load this screen, the accession number you were viewing on the Case Summary (NBS or PNS) screen is the Primary; the one you will specify in the Accession Number field will be the Secondary.

For PNS cases, once the two accession numbers have been linked, SIS will check for the following instances:

1. If the interpretation of the Primary case is 'Inadequate' or 'Too Early', then a new Diaried Event (used for historical tracking purposes) will be created in SIS for the Primary case.
2. If the interpretation for the Primary case is anything other than 'Inadequate' or 'Too Early', then the tracking status of the Secondary case will be changed to 'Unauthorized Redraw'.

For NBS cases, once the two accession numbers have been linked, SIS will check for the following instances:

1. If the Primary case is non-negative, a Diaried Event (used for historical tracking purposes) will be created in SIS.
2. If the Primary case is positive or 'Early', the system will change the specimen type for the Secondary case to "Type 31 – Recalls", except if the initial interpretation is Galactosemia or Hb positive.
3. If the Primary case is 'Inadequate' and the Secondary case is 'Adequate', the second adequate sample will close the case and create Diaried Events in both cases.

Link Accession Numbers (continued)

GDB-SIS

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab Coft
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Addl Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

3589::msc
01/06/2005
16:55:44.047

Data Intake » Case Summary (PNS) » Link Accn Numbers

Update Case (PNS) Adequacy Status (PNS) Case Notes Link Accn Numbers Re-assign CCC
Tracking Events Appointments Services History Enter PSR Link Client to Entity

Client Name: SANTA, MONICA Date of Birth: 11/28/1972
Accession Number: 338-03-111/P -2004-12

Primary Accession Number: 338-03-111/P -2004-12
Accession Number:

	Primary Accession	Selected Accession
Name:	SANTA , MONICA	
Maiden Name:		
Baby's Name:		
Twin:	No	
Date of Birth:	11/28/1972	
Birth Time:		
Collection Date:	11/30/2004 00:00	
Social Security Number:		
Address:	85256 W CAPITOL AVE , MILPITAS , California, 95035	
Phone:		
Gender:	Female	
Birth Weight:		

1. The client's basic information is displayed in a read-only format, based on the client profile.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field.
3. Click the **Display** button to add the second Accession Number and all related information to the Selected Accession column in the grid.
4. **Buttons:**
 - a. **Link** – creates a link between the Primary Accession number and the Selected Accession number (Secondary).
 - b. **Cancel** – Cancels the current operation.

Link Client to Entity

Data Intake >> Case Summary (PNS) >> Link Client to Entity

The **Link Client to Entity** screen is used to create relationships between clients and entities. Typically a client would be linked to a hospital-type entity or a person-type entity. Please note that only one relationship can be created between a client and a hospital-type entity, and only one relationship can be created between a client and a person-type entity.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (PNS) >> Link Client to Entity

Update Case (PNS) Adequacy Status (PNS) Case Notes Link Accn Numbers Re-assign CCC
 Tracking Events Appointments Services History Enter PSR Link Client to Entity

Client Name: **1** LOPEZ, SYLVIA Date of Birth: 10/2/1980

Existing Client Relationships **2**

Select:	Clinician Name	Hospital Name	Address	Primary Contact Number	Effective Start Date	Effective End Date
<input type="radio"/> 3	WILLIAMSON BARBARA		361 3rd St Ste E San Rafael 94901 California		01/03/2005	12/31/9999

3589::msc
01/11/2005
18:12:09.727

4

- Client information is displayed in a read-only format based on the information in the Case Summary screen.
- All of the client's existing entity relationships are displayed in the **Existing Client Relationships** grid.
- Click the radio button in the **Select** column to select a client relationship for editing.
- Buttons:**
 - Click the **Edit** button to make changes to the selected entity's relationship (see **FIGURE 2**).
 - Click the **New** button to create a new entity relationship for the client (see **FIGURE 2**).

Link Client to Entity (continued)

FIGURE 2

Entity Information

Entity ID: 3590 [Click here to Search for Entity](#) 5

Name: WILLIAMSON BARBA 6

Entity Code:

Entity Type:

Primary Contact Number: - - Ext. :

Status: Select 7

Effective Start Date: 01 - 03 - 2005 8

Effective End Date: 12 - 31 - 9999

Save Cancel 9

Current Relationships

Entity	Address	Role	Relation	Entity To	Contact Type	Address (Entity To)	Status	Updated By	Last Updated
Robert Smith		Consultative Sonologist	Works for	Kaiser-- San Francisco	Physical Location	2425 Geary Blvd San Francisco CA 94115 3358	Active	QAAdmin	1/19/2005

5. Click the **Click here to Search for Entity** link to search for the entity you would like to link to the client, or you may enter the entity information directly.
6. After locating an entity, the **Entity ID, Name, Entity Code and Entity Type** will be displayed. The Entity ID is automatically assigned to the entity by SIS at the time of creation and is read-only. The Entity Code is a unique code that identifies the entity according to the GDB/Program standards. The user is responsible for entering this value.
7. Enter the **Effective Start Date** of the client/entity relationship.
8. The **Effective End Date** is read-only, and will be automatically populated with 12/31/9999. If the relationship is modified (i.e. a new address is selected for the entity or a new entity is selected, then the current client/entity relationship will be end-dated with the date of the modification.
9. **Buttons:**
 - a. Click the **Save** button to save the client/entity link. Note, you must select an Entity Address in order to create a relationship.
 - b. Click the **Cancel** button to cancel the current action.

Link Client to Entity (continued)

FIGURE 3

3589::msc
01/11/2005
18:33:00.413

Current Relationships 10

Entity	Address	Role	Relation	Entity To	Contact Type	Address (Entity To)	Status	Updated By	Last Updated	
<input type="radio"/>	Robert Smith		Consultative Sonologist	Works for	Kaiser-- San Francisco	Physical Location	2425 Geary Blvd San Francisco CA 94115 3358	Active	QAAdmin	1/19/2005

Entity Addresses 11

Select:	Contact Type	Address	Telecom Info	Address Sta
<input type="radio"/>	Results Mailer	361 3rd St Ste E San Rafael CA 94901 3580		Active
<input checked="" type="radio"/> 12	Results Mailer	361 3rd St Ste E San Rafael CA 94901 3580		Active

Existing Client Relationships 13

Select:	Clinician Name	Hospital Name	Address	Primary Contact Number	Effective Start Date	Effective End
<input checked="" type="radio"/>	WILLIAMSON BARBARA		361 3rd St Ste E San Rafael 94901 California		01/03/2005	12/31/9999

New
Edit
14

10. Any existing relationships between the selected entity and other entities (i.e. between a clinician and a hospital) will be displayed in the **Current Relationships** grid.
11. Address records for the selected entity are displayed in the **Entity Address** grid. You must select an Entity Address in order to create a relationship.
12. Click the radio button next to an address record to select it for the relationship you are creating/editing.
13. Existing entity relationships for the selected client are displayed in the **Existing Client Relationships** grid.
14. **Buttons:**
 - a. Click the **New** button to create a new client/entity relationship.
 - b. Click the **Edit** button to edit the selected relationship.

Note: When adding a new entity relationship, all fields will be blank. When updating an existing entity relationship, the fields will be populated with existing information, and available for editing.

Link NBS Accession Numbers

Data Intake >> Case Summary (NBS) >> Link NBS Accn Numbers

The **Link NBS Accn Numbers** screen allows you to link two NBS accession numbers. The most common use of this screen is to link recalls and redraws. This screen provides the basic information for the two accession numbers side-by-side, in order to help you determine whether they should be linked.

The way the application performs the linking is:

1. The application checks for the specimen of the mother – If the specimen belongs to different mothers, the mother details are merged.
If the specimen is not a NBS specimen the application displays an error “Only NBS accession numbers can be linked from this screen.” However, if the specimen does not have a mother mapped the application displays the error “Unable to locate the Mother details for the selected client.”
2. Next, the application checks if both the specimens belong to the same client and if they belong to different clients, the clients are merged.

Additional conditions when SIS will not allow the accession numbers to be linked:

1. If both the accession numbers are not NBS related specimens.
2. If the specimen is related to a specimen from Special forms the application displays a message “NBS special forms clients cannot be resolved using this screen. Navigate to “Resolve Duplicates” to merge the NBS special forms client with an existing SIS client.”
3. If the accession numbers are already linked the application displays a message “The accession numbers are already linked.”
4. If the linked accession number is same as the original accession number then the application displays an error “Accession number cannot be linked to itself.”
5. If the program type is NBS and the difference between the accession dates is more than 32 weeks between the cases the application displays a message “Cases which are more than 32 weeks apart cannot be linked.”
6. If the application was not able to merge the two specimens then the application stops both the merge and the link process.

When you initially load this screen, the accession number you were viewing on the Case Summary (NBS) screen is the Primary; the one you will specify in the Accession Number field will be the Secondary.

Once the two accession numbers have been linked, SIS will check for the following instances:

1. If the Primary case is non-negative, a Diaried Event (used for historical tracking purposes) will be created in SIS.
2. If the Primary case is positive or ‘Early’, the system will change the specimen type for the Secondary case to “Type 31 – Recalls”, except if the initial interpretation is Galactosemia or Hb positive.

Link NBS Accn Numbers (continued)

- If the Primary case is 'Inadequate' and the Secondary case is 'Adequate', the second adequate sample will close the case and create Diaried Events in both cases.

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search
Id Search
View Client Profile
TRF Data Entry (NBS)
Case Summary (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Add Test Results
Audit Data Entry
Biotinidase Expected List
Expected Recall (NBS)
Case Resolution
MPKU Registry Search
Metabolic Service Report
Reassign MC
Cystic Fibrosis Service Report
Reassign CF
MS/MS Ref Lab Expectd
Enter Other Mutation
Test Results
Expected Phe
Monitoring
MF Annual Patient Summary
CF Annual Patient Summary
View CFF File Records

Data Intake » Case Summary (NBS) » Link NBS Accn Numbers

Update Case (NBS)	Adequacy Status (NBS)	Case Notes	Conf Test Results	Re-assign CCC																																	
Tracking Events	Appointments	Services History	Link Client to Entity	Case Audit Results SCCC																																	
Link NBS Accn Numbers	Counselor Checklist SCCC	CF Carrier Counseling	Unlink Specimens																																		
Client Name: Elisa, SAND Date of Birth: 9/28/2007 1 Accession Number: 277-31-051/21-2007-12																																					
Accession # to be linked: 276 -44 -125 /21 -2007 -11 2 <input type="button" value="Display"/> 3																																					
Accession Details 4 <table border="1"> <thead> <tr> <th></th> <th>Primary Accession number</th> <th>Selected Accession number</th> </tr> </thead> <tbody> <tr> <td>Baby's Name:</td> <td>Elisa, SAND</td> <td>ALICE, FERNANDES</td> </tr> <tr> <td>Maiden Name:</td> <td></td> <td></td> </tr> <tr> <td>Sex:</td> <td>Female</td> <td>Female</td> </tr> <tr> <td>Twin:</td> <td></td> <td></td> </tr> <tr> <td>Date of Birth:</td> <td>09/28/2007</td> <td>09/25/2007</td> </tr> <tr> <td>Birth Time:</td> <td>1258</td> <td>0858</td> </tr> <tr> <td>Collection Date:</td> <td>09/29/2007</td> <td>10/01/2007</td> </tr> <tr> <td>Collection Time:</td> <td>1313</td> <td>1100</td> </tr> <tr> <td>Birth Weight:</td> <td>3836</td> <td>3487</td> </tr> </tbody> </table>						Primary Accession number	Selected Accession number	Baby's Name:	Elisa, SAND	ALICE, FERNANDES	Maiden Name:			Sex:	Female	Female	Twin:			Date of Birth:	09/28/2007	09/25/2007	Birth Time:	1258	0858	Collection Date:	09/29/2007	10/01/2007	Collection Time:	1313	1100	Birth Weight:	3836	3487			
	Primary Accession number	Selected Accession number																																			
Baby's Name:	Elisa, SAND	ALICE, FERNANDES																																			
Maiden Name:																																					
Sex:	Female	Female																																			
Twin:																																					
Date of Birth:	09/28/2007	09/25/2007																																			
Birth Time:	1258	0858																																			
Collection Date:	09/29/2007	10/01/2007																																			
Collection Time:	1313	1100																																			
Birth Weight:	3836	3487																																			
Client Details 5 <table border="1"> <thead> <tr> <th></th> <th>Primary Client</th> <th>Selected Client</th> </tr> </thead> <tbody> <tr> <td>Name:</td> <td>Elisa, SAND</td> <td>ALICE, FERNANDES</td> </tr> <tr> <td>Client Id:</td> <td>35376550</td> <td>35374341</td> </tr> <tr> <td>Maiden Name:</td> <td></td> <td></td> </tr> <tr> <td>Ethnicity:</td> <td>Hispanic</td> <td>White, Hispanic, Black, Filipino, Native American</td> </tr> <tr> <td>Mother's Name:</td> <td>SANDOVAL, ELIZABETH</td> <td>ROMERO, LESLY</td> </tr> <tr> <td>Mother's Maiden Name:</td> <td>GARCIA</td> <td>ROMERO</td> </tr> <tr> <td>Mothers DOB:</td> <td>06/14/1980</td> <td>02/23/1974</td> </tr> <tr> <td>Social Security Number:</td> <td>565-61-2244</td> <td>394-B2-8805</td> </tr> <tr> <td>Address:</td> <td>PO BOX 2487, GONZALES, CA 93926</td> <td>10 Clover Cir, South San Francisco, CA 94080-1461</td> </tr> <tr> <td>Phone:</td> <td>(831)-675-2275</td> <td>(415)-407-3327</td> </tr> </tbody> </table>						Primary Client	Selected Client	Name:	Elisa, SAND	ALICE, FERNANDES	Client Id:	35376550	35374341	Maiden Name:			Ethnicity:	Hispanic	White, Hispanic, Black, Filipino, Native American	Mother's Name:	SANDOVAL, ELIZABETH	ROMERO, LESLY	Mother's Maiden Name:	GARCIA	ROMERO	Mothers DOB:	06/14/1980	02/23/1974	Social Security Number:	565-61-2244	394-B2-8805	Address:	PO BOX 2487, GONZALES, CA 93926	10 Clover Cir, South San Francisco, CA 94080-1461	Phone:	(831)-675-2275	(415)-407-3327
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Phone:	(831)-675-2275	(415)-407-3327																																			
<input type="button" value="Link"/> <input type="button" value="Cancel"/> 6																																					

TBishop::N095
12/30/2007
00:00:00.000

- The client's basic information is displayed in a read-only format, based on the client profile.
- Enter the accession number you want to link to the Primary case in the **Accession Number** field.
- Click the **Display** button to add the Accession Number and all related information to the Selected Accession column in the grid.
- The accession related information for the Primary and Secondary accession number are displayed here
- Information related to the two clients of the specimens is displayed in the "Client Details" section.
- Buttons:**
 - Link** – creates a link between the Primary Accession number and the Selected Accession number (Secondary).
 - Cancel** – Cancels the current operation.

Link PNS Cases

Data Intake >> Case Summary (PNS) >> Link PNS Cases

The **Link PNS Cases** (the name of the screen was Link Accession Numbers before PEII) screen allows you to link two accession numbers. The most common uses of this screen include recalls and redraws. This screen provides the basic information for the two accession numbers side-by-side, in order to help you determine whether they should be linked.

Before allowing a link of the two accession numbers, SIS will automatically validate that the two numbers do not belong to different clients. Linked Accession Numbers must always have the same client. If SIS determines that they belong to different clients, the system will not allow them to be linked, and will display an error message. Additional conditions when SIS will not allow the accession numbers to be linked:

1. If the accession numbers are same
2. The accession numbers are already linked.
3. If the accession numbers have different program types.
4. The difference between the accession dates is more than 32 weeks between the specimens.

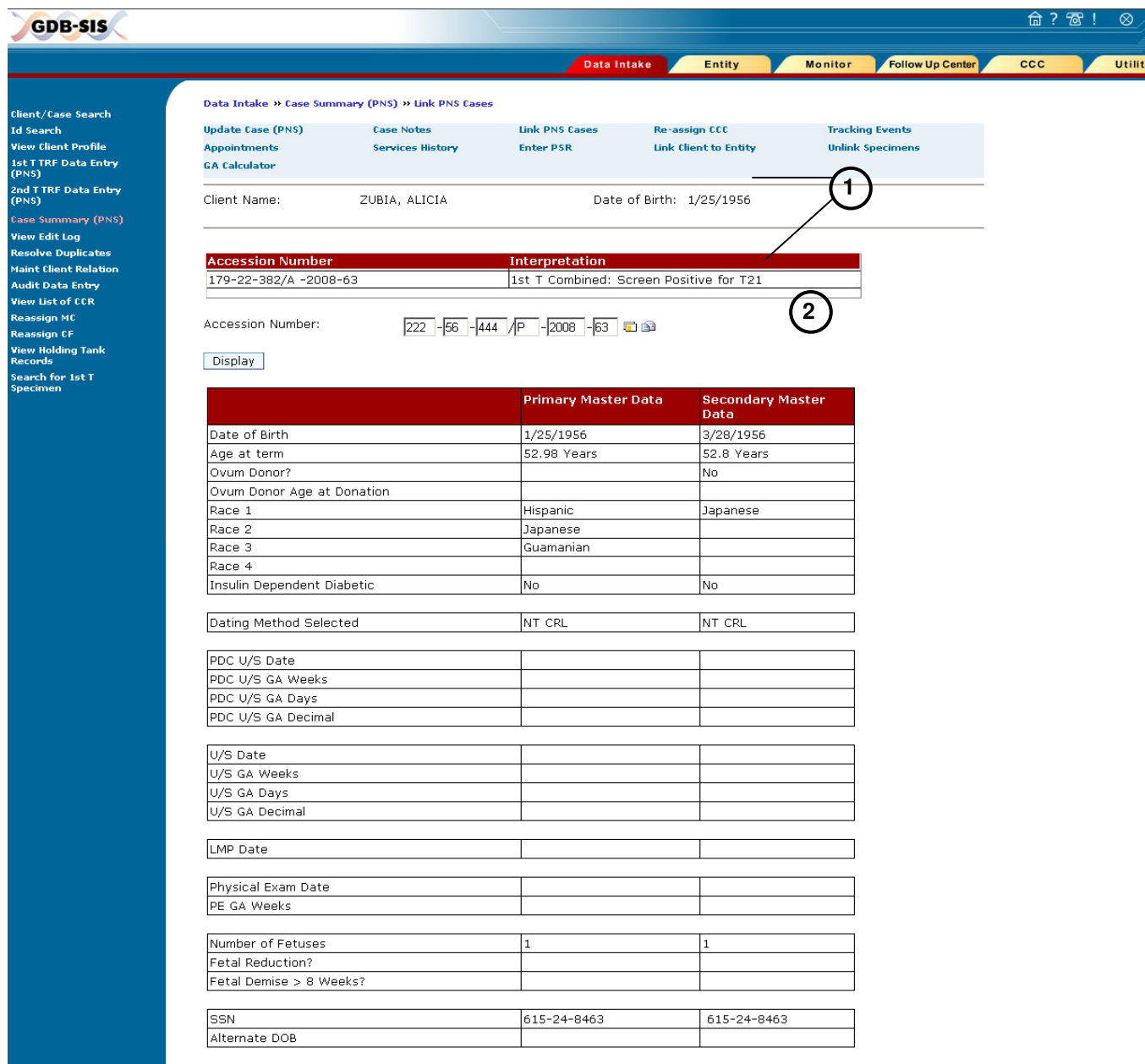
Also, if the Secondary accession number is prior to the Primary accession number, a warning popup message stating the same will be shown for confirmation.

When you initially load this screen, the accession number you were viewing on the Case Summary (PNS) screen is the Primary; the one you will specify in the Accession Number field will be the Secondary. If two Post-PEII specimens are being linked the user will have an option to edit one or more of the master data fields. If the primary specimen is a Post-PEII specimen and the secondary a Pre-PEII specimen the user will be able to view the master data for the specimens (note that if the primary specimen is a Pre-PEII the master information is not displayed).

For Post-PEII PNS cases, once the two cases (there can multiple specimens in the Primary/secondary) are linked the case is reinterpreted with the specimens and a risk assessment generated and the Tracking status changed accordingly. Mailers are also generated from the SIS application depending on the business rules.

It is important to note here that irrespective of the situation, neither the primary nor the secondary specimens become an ISI specimen (Insufficient Specimen Information) specimen after linking from the "Link PNS" screen.

Link PNS Cases (continued)



GDB-SIS

Data Intake > Case Summary (PNS) > Link PNS Cases

Client/Case Search

Id Search

View Client Profile

1st T TRF Data Entry (PNS)

2nd T TRF Data Entry (PNS)

Case Summary (PNS)

View Edit Log

Resolve Duplicates

Maint Client Relation

Audit Data Entry

View List of CCR

Reassign MC

Reassign CF

View Holding Tank Records

Search for 1st T Specimen

Data Intake > Case Summary (PNS) > Link PNS Cases

Update Case (PNS)

Case Notes

Link PNS Cases

Re-assign CCC

Tracking Events

Appointments

Services History

Enter PSR

Link Client to Entity

Unlink Specimens

GA Calculator

Client Name: ZUBIA, ALICIA Date of Birth: 1/25/1956

Accession Number	Interpretation
179-22-382/A -2008-63	1st T Combined: Screen Positive for T21

Accession Number: 222-56-444/P-2008-63

Display

	Primary Master Data	Secondary Master Data
Date of Birth	1/25/1956	3/28/1956
Age at term	52.98 Years	52.8 Years
Ovum Donor?		No
Ovum Donor Age at Donation		
Race 1	Hispanic	Japanese
Race 2	Japanese	
Race 3	Guamanian	
Race 4		
Insulin Dependent Diabetic	No	No
Dating Method Selected	NT CRL	NT CRL
PDC U/S Date		
PDC U/S GA Weeks		
PDC U/S GA Days		
PDC U/S GA Decimal		
U/S Date		
U/S GA Weeks		
U/S GA Days		
U/S GA Decimal		
LMP Date		
Physical Exam Date		
PE GA Weeks		
Number of Fetuses	1	1
Fetal Reduction?		
Fetal Demise > 8 Weeks?		
SSN	615-24-8463	615-24-8463
Alternate DOB		

Fig 1: When the Primary specimen is a Post-PEII specimen

1. The client's basic information is displayed in a read-only format, based on the client profile. For Post-PEII cases, all the specimens in the Primary case are displayed along with their Interpretation in a grid format.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field. For Post-PEII cases, this accession number could belong to any case of the client provided it meets the business rules mentioned earlier.
3. Click the **Display** button to add the second Accession Number and all related information to the "Secondary Master Data" column in the grid.

Link PNS Cases (continued)

mflesell:43
 12/31/2008
 00:00:00.000

NT Information 4

☐ Copy all NT Information from Secondary Master Data

	Primary Master Data	Secondary Master Data
NT information entered by NT practioner?	No	No
NT information updated by coordinator?	No	Yes
NT Site Code		
NT Site Name		
NT Practioner Name	Goldman, Sara	Goldman, Sara
NT Practioner Phone	510-412-1463	510-412-1463
NT Practitioner Credential #	P01003	P01003
NT Supervisor Credential #		
NT Exam Date	06/30/2008	06/28/2008
CRL GA on NT Exam Date	11 Weeks 3 Days	11 Weeks 5 Days
Twins by NT Ultrasound?	No	No
Chorionicity?		
Fetus A:		
NT CRL (mm)	46	49
NT Measurement (mm)	2	2.5
Fetus B:		
NT CRL (mm)		
NT measurement (mm)		

Edit Link Cancel
5

Fig 2: NT Information when the Primary specimen is a Post-PEII specimen

4. When the “Copy all NT Information from Secondary Master data” is selected the application checks if the <Edit> is clicked (see functionality of “Edit” below) and if so does the following steps:
 - a. If the “Copy all NT Information from Secondary Master Data” is selected (i.e. the display is ☒) then NT data from the secondary specimen is copied to the primary specimen (except the “NT information entered by NT Practioner” and “NT information updated by coordinator” fields).
 - b. If the “Copy all NT Information from Secondary Master Data” is not selected (i.e. the display is ☐) then the original NT data of the Primary specimen is displayed.

Please note that <Edit> button needs to be clicked in order to copy the NT data.

5. Buttons:

- a. **Edit** – If the Primary and secondary specimens are Post-PEII specimens then the application will allow the Master and NT information of the Primary specimen information to be changed from the “Link PNS” screen directly before linking.
If the “Copy all NT Information from Secondary Master Data” is selected then all the NT information fields are copied over from the secondary specimen to the Primary specimen and then displayed.

Link PNS Cases (continued)

- b. **Link** – Creates a link between the Primary Accession number and the Selected Accession number (Secondary). If the linking process is successful, the application displays a message “Accession numbers linked successfully” and the complete screen (including master and NT information) is refreshed and displays the updated details after linking
- c. **Cancel** – Cancels the current operation.

For Pre-PEII PNS specimens, once the two accession numbers have been linked, SIS will check for the following instances:

1. If the interpretation of the Primary case is 'Inadequate' or 'Too Early', then a new Diaried Event (used for historical tracking purposes) will be created in SIS for the Primary case.
2. If the interpretation for the Primary case is anything other than 'Inadequate' or 'Too Early', then the tracking status of the Secondary case will be changed to 'Unauthorized Redraw'.

GDB-SIS

Client/Case Search
Id Search
View Client Profile
1st TTRF Data Entry (PNS)
2nd TTRF Data Entry (PNS)
Case Summary (PNS)
View Edit Log
Resolve Duplicates
Maint Client Relation
Audit Data Entry
View List of CCR
Reassign MC
Reassign CF
View Holding Tank Records
Search for 1st T Specimen

Data Intake » Case Summary (PNS) » Link PNS Cases

Update Case (PNS)
Appointments
GA Calculator

Case Notes
Services History

Link PNS Cases
Enter PSR

Re-assign CCC
Link Client to Entity

Tracking Events
Unlink Specimens

Client Name:
Accession Number: 278-12-121/P -2007-12

Date of Birth: 11/14/1976

Primary Accession Number: 278-12-121/P -2007-12

Accession Number: 278 -60 -090 /P -2007 -12

Display

	Primary Accession	Selected Accession
Name:		
Maiden Name:		
Baby's Name:		
Twin:		
Date of Birth:	11/14/1976	11/14/1976
Birth Time:		
Collection Date:	10/04/2007	
Social Security Number:		
Address:	2049 Mckenzie Pl, San Jose, California, 95131- 2573	2049 Mckenzie Pl, San Jose, California, 95131- 2573
Phone:	(512) 796 1893	(512) 796 1893
Gender:	Female	Female
Birth Weight:		

Link Cancel

mflsessel: 44
09/09/2008
00:00:00.000

Fig 3: When the Primary specimen is a Pre-PEII specimen

Link PNS Cases (continued)

1. The client's basic information is displayed in a read-only format, based on the client profile.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field.
3. Click the **Display** button to add the second Accession Number and all related information to the Selected Accession column in the grid.
4. **Buttons:**
 - a. **Link** – creates a link between the Primary Accession number and the Selected Accession number (Secondary).
 - b. **Cancel** – Cancels the current operation

If the primary specimen is a Pre-PEII PNS specimen the application displays a similar screen as Fig 3 but the important distinction between linking Pre-PEII specimens and Post-PEII specimens is that when two Post-PEII specimens are linked then it is possible for the user to edit master and NT information. The interpretation also changes based on the specimens being linked (if two Post-PEII specimens are linked).

However, when either specimen is a Pre-PEII PNS specimen the application does not reinterpret the case and does not allow modification of master and NT Information.

Maintain Business Rules

Utilities >> Maint Business Rules

This screen allows you to view the Maintain Mailer Text, the PNS Interpretation Grid, the NBS Interpretation Grid, and the PNS Interpretation Parameters screens.

Change Password
View All Users
Batch Run Time Rept
Assign CCC/Lab
Maint Time Parameter
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test

15715: :gdb002
12/08/2004
09:36:33.213

	Version	Program Area	Status
<input type="radio"/>	1.0201	NBS	Editable
<input type="radio"/>	8.0101	PNS	Editable
<input type="radio"/>	1.0101	NBS	Read-Only

1

View Interpretation Grid View PNS Mailer Grid

View Maintain Mailer Text View Interpretation Parameters

2

1. This grid displays the status and version number of the interpretation grids for each program area. Use the radio buttons to select which program area grid to view. Only the newest versions of each will be editable. All previous versions will be read-only.
2. **Buttons:**
 - a. The **View Interpretation Grid** button directs you to the Interpretation Grid screen for your selected program area (see #1, PNS or NBS), which allows you to view and modify variables that control result mailers, case status, and headline case determination.
 - b. The **View PNS Mailer Grid** button directs you to the PNS Mailer Grid screen, which allows you to view the PNS Mailer Grid, and update individual Grid Line Sequence values.
 - c. The **View Maintain Mailer Text** button directs you to the Maintain Mailer Text screen for your selected program area (see #1, PNS or NBS), which allows you to search for and update mailers.
 - d. The **View Interpretation Parameters** button directs you to the Interpretation Parameters screen for your selected program area (see #1, PNS or NBS), which allows you to view and update the interpretation constant values.

Maintain CEUs

Entity >> Entity Profile >> Maintain CEU's

The **Maintain CEU's** screen is used to view, create and update Course Education Unit (CEU) information for an entity. Typically, CEU information will be tracked for "person-type" entities, however SIS will allow you to enter CEU information for any entity type.

FIGURE 1

Entity >> Entity Profile >> Maintain CEU's

View Address Entity Relation **Maintain CEU's** License Certification

Entity Services Cond for PDC Approval

Entity ID: 4277 Entity Code:

Entity Name: Smith, Robert

Number of CEUs

No. of CEUs	Course Name	Start Date	End Date	Next CEU Due By
10	Genetic Counselor Training	12-15-2004	01-15-2005	03-15-2005

Add Edit

3529: : qaadmin
12/17/2004
11:40:05.590

1. Information about the entity that is currently selected is displayed in a read-only format. To update this information you must use the Entity Profile screen.
2. The **Number of CEUs** grid displays existing CEU information for the selected entity.
3. **Buttons:**
 - a. Click the radio button next to the CEU and then click the **Edit** button to make changes to the selected CEU record (see **FIGURE 2**).
 - b. Click the **Add** button to add a new CEU record for the selected entity.

Maintain CEUs (continued)

FIGURE 2

Entity ID: 4277 Entity Code:

Entity Name: Smith, Robert

Enter/edit CEU Information

* Number of CEUs: 5

Course Name: Radiology Update Training

Start Date: 12-17-2004

End Date: 03-31-2005

Next 30 CEUs due by:

Save Clear Cancel

Number of CEUs

No. of CEUs	Course Name	Start Date	End Date	Next CEU Due By
10	Genetic Counselor Training	12-15-2004	01-15-2005	03-15-2005
5	Radiology Update Training	12-17-2004	12-17-2005	03-31-2005

4. For updating the existing CEU information, **Number of CEUs** is a required field. If available, enter the CEU expiration in the **End Date** field. If no value is entered SIS will automatically enter "12/31/9999". The **Course Name** and **Next CEU Due By** fields will be left blank in the grid if no information is provided.
5. **Buttons:**
 - c. Click the **Save** button to save the updated CEU record with the information you entered in the fields above.
 - d. Click the **Clear** button to clear the information you have entered discarding any unsaved data.
 - e. Click the **Cancel** button to discard any unsaved CEU information you have entered and return to the previous screen.

Note: If you click the Add button instead of the Edit button, the fields will be empty. After clicking Save, a row will be added to the Number of CEU's grid.

Maintain Client Relationships

Data Intake >> Maint Client Relation

This screen allows you to add new, update existing, or delete relationships between clients, such as child, parent or sibling relationships.

FIGURE 1

Data Intake >> Maint Client Relation

Search Relationships

Client Name: DOE, MARY Date of Birth: 1/22/1973

Last Name of client to relate:

First Name of client to relate:

Relationship: Select

Current Relationships

Select:	Last Name	First Name	Social Security Number	Date of Birth	Relationship to Client
<input type="radio"/>	DOE	JANE		01/10/1980	sibling

Add Relationship Delete Update Return Selected

1. The Client information is displayed in a read-only format, based on the Client Profile.
2. Information for related client. When you select a client record from the Current Relationships grid, and click the Update button, the selected client's Last Name, First Name and Relationship will be populated in these fields. Last Name and First Name will be displayed in a read-only format. You may update the Relationship.
3. Relationships that have already been created for the client will be displayed in the **Current Relationships** grid.

Maintain Client Relationships (continued)

FIGURE 2

Data Intake » Maint Client Relation

Search Relationships

Client Name: DOE, MARY Date of Birth: 1/22/1973

Last Name of client to relate:

First Name of client to relate:

Relationship:

Current Relationships

Select:	Last Name	First Name	Social Security Number	Date of Birth	Relationship to Client
<input type="radio"/>	DOE	JANE		01/10/1980	sibling

4

4. Buttons:

- Add Relationship** – Directs you to the Search Relationships screen. From this screen, you may search for another client, and create a relationship between the two clients from the Search screen.
- Return Selected** – Returns the relationship data selected (using the radio button) from the grid.
- Delete** – Deletes the relationship record from the Current Relationships grid.
- Update** – When you select a client record from the Current Relationships grid, and click the **Update** button, the selected client's Last Name, First Name and Relationship will be populated in the fields above. Last Name and First Name will be displayed in a read-only format. You may update the Relationship.

Maintain Mailer Text

Utilities >> Maint Business Rules >> Maintain Mailer Text

This screen allows you to search for, view, and update the text of the mailers that will be generated by SIS. The mailers are tied to an interpretation version for either PNS or NBS. Only the mailers associated with the newest interpretation versions will be editable. All previous versions will be read only.

FIGURE 1

Utilities >> Maint Business Rules >> Maintain Mailer Text

Mailer Text Id:

Program Area:

Text Type:

Description:

Search Results

Select	Mailer Text Id	Program Area	Text Type	Description
<input type="radio"/>	CCLOOK4MM	PNS	Confirmation of contact - Head	CCLOOK4MM
<input checked="" type="radio"/>	CCPHONE	PNS	Confirmation of contact - Head	CCPHONE
<input type="radio"/>	CCVARTXTHD	PNS	Confirmation of contact - Head	CCVARTXTHD
<input type="radio"/>	MAILHEAD	PNS	Confirmation of contact - Head	MAILHEAD

1. Any combination of these fields can be used as search criteria.
2. **Button:**
 - a. **Search** button will initiate a search based on the search criteria you have entered.
 - b. **Cancel** button cancels any unsaved changes, and directs you to the Maintain Business Rules screen, which allows you to view the Maintain Mailer Text, the PNS Interpretation Grid, the NBS Interpretation Grid, and the PNS Interpretation Parameters screens.
3. **Search Results** grid allows you to select the mailer you wish to view and/or edit by using the radio buttons.
4. **Update** button displays the mailer details for the selected mailer record, and allows you to make changes.

Maintain Mailer Text (continued)

FIGURE 2

The screenshot shows a web-based form for maintaining mailer text. On the left, a blue sidebar contains a log of activity: '3446::gdb002', '01/11/2005', and '21:01:47.937'. The main form area has several fields and buttons. Callout 5 points to the 'Version:' field, which is currently empty. Callout 6 points to the 'Effective Date:' field, which is set to '01-01-2000' and includes a calendar icon. Callout 7 points to the 'Save' and 'Cancel' buttons at the bottom left. The form also includes fields for 'Mailer Text Id:', 'Program Area:', 'Text Type:', 'Description:', and 'Mailer Text:'. The 'Program Area:' field is set to 'PNS'. The 'Text Type:' field is set to 'Confirmation of contact - Head'. The 'Description:' field is set to 'CCPHONE'. The 'Mailer Text:' field is a large text area that is currently empty.

5 Version:
Mailer Text Id:
Program Area:
Text Type:
Effective Date:
Description:
Mailer Text:

6 01-01-2000

7 Save Cancel

5. The mailer details will only be displayed after a specific mailer has been selected with the radio button, and the **Update** button is clicked.
6. **Effective Date** must be greater than the current date.
7. **Buttons:**
 - a. **Save** button will save the updated mailer information in SIS.
 - b. **Cancel** button cancels any unsaved changes, and returns you to the Search Results grid.

Maintain NT Sites

Entity » Entity Profile » NT Practitioner Data

The **Maintain NT Sites** screen is used to add or edit credential information for an entity who is a NT Practitioner. This screen is also used to add medians for a NT Practitioner. Only users with security settings for NT Practitioners can maintain this information.

FIGURE 1

Entity » Entity Profile » NT Practitioner Data

Address/Phone Entity Relation License Certification Entity Services

NT Practitioner Data

Entity ID: 11244508 Entity Code:

Entity Name: BLAIN, Nisha

Credentialing Information

Select Credential Number	Credentialing Agency	Credentialing Status	Effective Start Date	Effective End Date
<input type="radio"/> 00050	FMF	Inactive	04/27/2008	
<input type="radio"/> 00050	FMF	Active	12/15/2007	04/26/2008
<input checked="" type="radio"/> P00050	NTQR	Active	12/15/2007	

Add Edit

*Credentialing Agency: NTQR

*Credential Number: P00050

*Credential Status: Active

*Effective Start Date: 12/15/2007

Save Cancel

bcuurier: :001
04/27/2008
00:00:00.000

- Information about the selected entity is displayed in a read-only format based on the Entity Profile.
- The existing credential information of a NT Practitioner is displayed in the **Credentialing Information** datagrid. The effective start and end dates for a credentialing agency (FMF or NTQR) do not overlap.
- Buttons:**
 - On clicking **Add** button, the section 4 is displayed where new credentialing information can be added.
 - On selecting a record in the **Credentialing Information** datagrid and clicking **Edit** button, the section 4 is displayed with values pre-populated from the record.
- Credentialing Agency, Credential Number, Credential Status and Effective Start Date** are required fields. On **Save**, a new record is displayed in the **Credentialing Information** datagrid. The effective end date of the new record is set to 12/31/9999 and is displayed as blank. The effective end date of the previous record becomes a day before effective start date of new record.

Maintain NT Sites (continued)

FIGURE 2

bcourrier:001
04/27/2008
00:00:00.000

Medians

Version	Intercept	Slope	Effective Start Date	Effective End Date
1	-0.112000	0.005400	12/16/2007	04/26/2008
2	-0.113400	0.006500	04/27/2008	

Add

*Intercept:
 *Slope:
 *Effective Start Date: --

Save **Cancel**

Other Information

Role/Title:

Save **Cancel**

5. The existing intercepts and slopes for a NT Practitioner are displayed in the **Medians** datagrid. The effective start and end dates for a credentialing agency do not overlap.
6. On clicking **Add** button, the section 7 is displayed where new medians can be added.
7. **Intercept**, **Slope** and **Effective Start Date** are required fields. On **Save**, a new record is displayed in the **Medians** datagrid. The Version number is incremented by 1 on every addition. The effective end date of the new record is set to 12/31/9999 and is displayed as blank. The effective end date of the previous record becomes a day before effective start date of new record.
8. Role/Title for the NT Practitioner can be added in the Other Information section. The field is not mandatory.

Maintain NBS Interpretation Parameters

Utilities >> Maint. Business Rules >> NBS Interp. Parameters

This screen is used to view and maintain all interpretation parameters used in the NBS algorithms in SIS.

FIGURE 1

Utilities >> Maint Business Rules >> NBS Interp Parameters

NBS Version

Version: 8.0101 (1)

Date: 10-01-2006

NBS Cutoff (2)

Code	Cutoff Value	Created By	Created Date	Updated By	Updated Date
AND	-100.00	2	09/30/2006	2	09/30/2006
COR	-100.00	2	09/30/2006	2	09/30/2006
OHP	38.00	2	09/30/2006	2	09/30/2006
RCA	3.75	2	09/30/2006	2	09/30/2006
TRA	50.00	2	09/30/2006	2	09/30/2006
TSH	25.00	2	09/30/2006	2	09/30/2006
BD	10.00	2	03/06/2007	2	03/06/2007
IRT-P	75.00	2	03/06/2007	3	03/06/2007
IRT-I	999.00	2	03/06/2007	2	03/06/2007
CF1-I	1.00	2	03/06/2007	2	03/06/2007
CF1-P	2.00	2	03/06/2007	2	03/06/2007
CF1-N	0	2	03/06/2007	2	03/06/2007

1. Use the **Version** dropdown box to select the NBS Interpretation Parameters version to be viewed. The version **Date** will be displayed automatically based on the version you select.
2. The **NBS Cutoff** grid displays the cutoff values for each analyte. If you are viewing the newest version, you will be able to make changes to the Cutoff Value fields. If you are viewing an older version, the Cutoff Value fields will be read-only.

Maintain NBS Interpretation Parameters (continued)

FIGURE 2

3 NBS Birth Weight Range											
Code	Version	Upper Limit	Lower Limit	Indeterminate Cutoff	Positive Cutoff	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
33	8.0000	999	0	220.000000	600	1	N	2	09/30/2006	2	09/30/2006
34	8.0000	1499	1000	220.000000	250	2	N	2	09/30/2006	2	09/30/2006
35	8.0000	2499	1500	150.000000	210	3	N	2	09/30/2006	2	09/30/2006
36	8.0000	9999	2500	120.000000	180	4	N	2	09/30/2006	2	09/30/2006

4 NBS MSMS Range											
Code	Version	Min. Age at Collection in Days	Max. Age at Collection in Days	Min. Birth Weight in Grams	Max. Birth Weight in Grams	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
RG1	8.0000	0	10	0	1500	1	N	2	09/30/2006	2	09/30/2006
RG2	8.0000	0	10	1500	9999	2	N	2	09/30/2006	2	09/30/2006
RG3	8.0000	11	99	0	9999	3	N	2	09/30/2006	2	09/30/2006

3. **NBS Birth Weight Range:** The Upper Limit, Lower Limit, Indeterminate Cutoff and Positive Cutoff field values may be changed, if applicable.
4. **NBS MSMS Range:** The Min. Age of Collection in Days, Max. Age of Collection in Days, Min. Birth Weight in Grams and Max. Birth Weight in Grams values may be changed, if applicable.

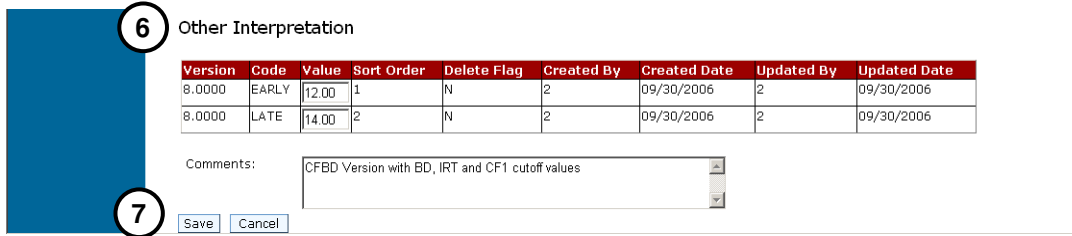
Maintain NBS Interpretation Parameters (continued)

FIGURE 3
5
NBS MSMS Analyte Range

Code	Version	Analyte Code	Panel Code	Cut-off Code	Analyte Category Code	Elevation	Lower Cutoff	Upper Cutoff	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
RG1	8.0000	ALA	AMN	H	A	O	0	900.0000	2	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	ARG	AMN	H	A	P	0	200.0000	3	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C02	ACL	B	A	O	5.0000	85.0000	5	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C03	ACL	H	A	O	0	6.5000	6	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C03DC	ACL	H	A	P	0	0.3000	7	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C04	ACL	H	A	P	0	1.8000	8	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C04DC	ACL	H	A	O	0	2.6000	9	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C05	ACL	H	A	P	0	1.2000	10	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C051	ACL	H	A	R	0	0.4000	11	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C05DC	ACL	H	A	P	0	0.3500	12	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C05OH	ACL	H	A	P	0	1.2000	13	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C06	ACL	H	A	O	0	0.7000	14	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C08	ACL	H	A	P	0	0.5000	15	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C081	ACL	H	A	O	0	0.9000	16	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C10	ACL	H	A	O	0	0.6000	17	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C101	ACL	H	A	O	0	0.4500	18	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C12	ACL	H	A	O	0	2.0000	19	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C121	ACL	N	A	N	-1.0000	9999.9999	20	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C14	ACL	H	A	R	0	1.1000	21	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C141	ACL	H	A	P	0	0.8000	22	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C14OH	ACL	H	A	R	0	0.4000	23	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C16	ACL	H	A	P	0	10.0000	24	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C161	ACL	H	A	R	0	1.2000	25	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C16OH	ACL	H	A	P	0	0.3000	26	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C18	ACL	H	A	R	0	3.5000	27	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C181	ACL	H	A	R	0	4.0000	28	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C181OH	ACL	H	A	R	0	0.3500	29	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C182	ACL	N	A	R	-1.0000	9999.9999	30	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C18OH	ACL	H	A	R	0	0.4000	31	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	CIT	AMN	H	A	P	0	80.0000	32	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	FC	ACL	B	A	O	12.0000	220.0000	33	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	GLY	AMN	N	A	N	-1.0000	9999.9999	35	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	MET	AMN	H	A	R	0	100.0000	36	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	ORN	AMN	H	A	P	0	500.0000	37	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	OXP	AMN	N	A	N	-1.0000	9999.9999	38	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	PHE	AMN	H	A	O	0	140.0000	39	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	PRO	AMN	H	A	R	0	1000.0000	40	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	R14_12	ACL	N	R	N	-1.0000	9999.9999	41	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	R3_2	ACL	H	R	O	0	0.2500	42	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	R8_10	ACL	N	R	N	-1.0000	9999.9999	43	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RA_O	AMN	N	R	N	-1.0000	9999.9999	44	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RC_A	AMN	N	R	N	-1.0000	9999.9999	45	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RF_C	ACL	H	R	R	0	100.0000	46	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RF_Y	AMN	H	R	O	0	2.3000	47	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RL_A	AMN	H	R	O	0	1.5000	48	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RO_C	AMN	N	R	N	-1.0000	9999.9999	49	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	TYR	AMN	H	A	P	0	700.0000	50	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	VAL	AMN	N	A	N	-1.0000	9999.9999	51	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	XLE	AMN	H	A	O	0	200.0000	52	N	2	09/30/2006	2	09/30/2006

5. **NBS MS/MS Analyte Range:** The Lower Cutoff and Upper Cutoff fields may be changed if applicable.

Maintain NBS Interpretation Parameters (continued)

FIGURE 4

6 Other Interpretation

Version	Code	Value	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
8.0000	EARLY	12.00	1	N	2	09/30/2006	2	09/30/2006
8.0000	LATE	14.00	2	N	2	09/30/2006	2	09/30/2006

Comments: CFBD Version with BD, IRT and CF1 cutoff values

7 Save Cancel

6. **Other Interpretation:** The Value field for each interpretation type may be changed, if applicable.
7. **Buttons:**
 - a. **Save:** Updates any changes made to the interpretation parameters.
 - b. **Cancel:** Disregards any changes and directs the user to the Maintain Business Rules screen.

Maintain PNS Interpretation Parameters

Utilities >> Maint Business Rules >> PNS Interp Parameters

This screen allows you to view and update all interpretation parameters used in the PNS algorithm in SIS.

FIGURE 1

Utilities >> Maint Business Rules >> PNS Interp Parameters

PNS Version

Version: 14.0001
 Date: 12-15-2007

PNS Kit Lots

ID	Analyte	Cutoff Value	Date	Lowest
178992	UE3		12-15-2007	0.1500
191355	AFP		12-15-2007	5.0000
224088	HCG		12-15-2007	0.3600
224088	HG1		12-15-2007	2.0000
224088	INH		12-15-2007	10.0000
224088	PA1		12-15-2007	0.2000

1. Use the version dropdown box to select the PNS Interpretation parameters to be viewed. If you are viewing the newest version of the interpretation parameters, you will be able to make changes to the interpretation parameter fields as necessary. If you are viewing an older version, the fields will be read-only. Any change in the current version values will automatically create a new version. User has the option to set the start date of a newer version. Use the dropdown box to select the PNS Interpretation Parameters **Version** you would like to view. The version **Date** will be displayed automatically based on the selected version you select.
2. **PNS Kit Lots:** The Cutoff Value, Date, and Lowest fields may be edited.

Note: Each grid contains some values which may be edited. Other fields are not available for updating.

Maintain PNS Interpretation Parameters (continued)

FIGURE 2

PNS Adjustment Factor Dating

3

Code	Analyte	Parameter	Adjustment Value
L	AFP	ADJ_IN	0.272800
L	AFP	ADJ_SL	108.214040
L	AFP	MED_IN	0.428090
L	AFP	MED_SL	0.009580
L	HCG	ADJ_IN	0.436000
L	HCG	ADJ_SL	85.240000
L	HCG	MED_C1	13.546000
L	HCG	MED_C2	-0.066000
L	HCG	MED_C3	9.800000
L	HG1	ADJ_IN	0.902460
L	HG1	ADJ_SL	62.007000
L	HG1	MED_IN	2.468000
L	HG1	MED_SL	-0.007200
L	INH	ADJ_IN	0.583220
L	INH	ADJ_SL	71.680100
L	INH	MED_C1	672.113130
L	INH	MED_C2	-8.258250
L	INH	MED_C3	0.033930
L	PA1	ADJ_IN	0.994540
L	PA1	ADJ_SL	53.067520
L	PA1	MED_IN	-1.750000
L	PA1	MED_SL	0.025000
L	UE3	ADJ_IN	0.665860
L	UE3	ADJ_SL	46.527420
L	UE3	MED_IN	-1.665850
L	UE3	MED_SL	0.015170
N	AFP	ADJ_IN	0.400000
N	AFP	ADJ_SL	88.980000
N	AFP	MED_IN	0.620000
N	AFP	MED_SL	0.010000
N	HCG	ADJ_IN	0.230000
N	HCG	ADJ_SL	114.020000
N	HCG	MED_C1	15.550000
N	HCG	MED_C2	-0.090000
N	HCG	MED_C3	12.800000
N	HG1	ADJ_IN	0.510000
N	HG1	ADJ_SL	100.000000
N	HG1	MED_IN	2.470000
N	HG1	MED_SL	-0.010000
N	INH	ADJ_IN	0.330000
N	INH	ADJ_SL	99.780000
N	INH	MED_C1	696.510000

3. **PNS Adjustment Factor Dating:** The Adjustment Value field may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 3
PNS Interpretation Constants
4

Name	Value
ELVTD_HCG_CUTOFF	2.000000
FST_MAX_GEST_AGE_FOR_NTD	97.000000
FST_MIN_GEST_AGE_FOR_NTD	70.000000
ISL_AGE_AT_TERM_RANGE_MAX	55.000000
ISL_AGE_AT_TERM_RANGE_MIN	10.000000
ISL_BCD_ACC_DIFF	30.000000
ISL_BLOOD_COLL_DATE_OLD	365.000000
ISL_FST_GA_US_GA_NT_DIFF_DAYS	10.000000
ISL_FST_MTHRL_WT_CUTOFF_LBS_MAX	350.000000
ISL_FST_MTHRL_WT_CUTOFF_LBS_MIN	75.000000
ISL_FST_SEC_DSTNCT_ETH_COUNT	5.000000
ISL_FST_SEC_WT_DIFF_MAX	40.000000
ISL_FST_SEC_WT_DIFF_MIN	50.000000
ISL_GA_CUTOFF_VALUE	4.000000
ISL_GA_LMP_GA_EXAM_DIFF_DAYS	30.000000
ISL_GA_MAX_CUTOFF_VALUE	40.000000
ISL_GA_US_GA_EXAM_DIFF_DAYS	30.000000
ISL_GA_US_GA_LMP_DIFF_DAYS	30.000000
ISL_MAX_CRL_MSRMT_VAL	84.000000
ISL_MAX_NT_MSRMT_VAL	10.000000
ISL_MIN_CRL_MSRMT_VAL	45.000000
ISL_MIN_GEST_AGE_AT_COLL_NT	50.000000
ISL_MIN_NT_MSRMT_VAL	0.100000
ISL_MTHRL_WT_CUTOFF_LBS_MAX	350.000000
ISL_MTHRL_WT_CUTOFF_LBS_MIN	75.000000
ISL_NTDATE_USDATE_DIFF_DAYS	30.000000
ISL_SEC_GA_US_GA_NT_DIFF_DAYS	10.000000
ISL_UTERINE_MIN_SIZE	0.000000
MAX_CRL_MSRMT_VAL	84.000000
MAX_GEST_AGE_AT_COLL	147.000000
MAX_GEST_AGE_AT_COLL_1	97.000000
MAX_GEST_AGE_AT_COLL_NT	126.000000
MAX_GEST_AGE_FOR_NTD	140.000000
MAX_NT_MSRMT_VAL	10.000000
MAX_VE3_SPECIMEN_AGE	10.000000
MIN_CRL_MSRMT_VAL	45.000000
MIN_GEST_AGE_AT_COLL	98.000000
MIN_GEST_AGE_AT_COLL_1	70.000000
MIN_GEST_AGE_AT_COLL_NT	70.000000
MIN_GEST_AGE_FOR_NTD	105.000000
MIN_NT_MSRMT_VAL	0.100000
MOTHER_AGE_CUTOFF_YEARS_MAX	50.000000
MOTHER_AGE_CUTOFF_YEARS_MIN	20.000000
MOTHER_WEIGHT_CUTOFF_LBS_MAX	279.000000
MOTHER_WEIGHT_CUTOFF_LBS_MIN	90.000000
NT_GA_OTH_GA_DIFF_DAYS	30.000000
NTD_CUTOFF_MULTIPLE_FETUS_MOM	4.500000
NTD_CUTOFF_SINGLE_FETUS_MOM	2.500000
SLOS_APRIORI_RISK	0.000010

PNS Interpretation Adjustments Factor
5

Code	Analyte	Cutoff Value
EBF_FR	AFP	0.860000
IDD_FR	AFP	0.750000
SMK_FR	AFP	1.000000
TWN_FR	AFP	2.110000
EEA_FR	HCG	0.910000
ESA_FR	HCG	0.930000
IDD_FR	HCG	0.940000
SMK_FR	HCG	0.770000
TWN_FR	HCG	2.020000
IDD_FR	HG1	0.900000
SMK_FR	HG1	1.030000
TWN_FR	HG1	2.100000
IDD_FR	INH	0.880000
SMK_FR	INH	1.560000
TWN_FR	INH	2.050000
IDD_FR	NT	1.000000
TWN_FR	NT	1.000000
IDD_FR	PA1	1.020000
SMK_FR	PA1	0.827000
TWN_FR	PA1	1.900000
EAF_FR	UE3	0.925000
EHF_FR	UE3	0.947000
IDD_FR	UE3	0.920000
SMK_FR	UE3	1.000000
TWN_FR	UE3	1.690000

- PNS Interpretation Constants:** The value field may be edited.
- PNS Interpretation Adjustments Factor:** The cutoff value field may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 4

PNS Interpretation Age Risk

6

Code	Parameter	COEF_NAME	COEF_VAL
T18	AGE_C1	Age Risk Coefficient 1 for T18	7.330000
T18	AGE_C2	Age Risk Coefficient 2 for T18	4.211000
T18	AGE_C3	Age Risk Coefficient 3 for T18	-0.282000
T18	AGE_C4	Age Risk Coefficient 4 for T18	37.230000
T18	AGE_C5	Age Risk Coefficient 5 for T18	
T21	AGE_C1	Age Risk Coefficient 1 for Down Syndrome	7.330000
T21	AGE_C2	Age Risk Coefficient 2 for Down Syndrome	4.211000
T21	AGE_C3	Age Risk Coefficient 3 for Down Syndrome	-0.282000
T21	AGE_C4	Age Risk Coefficient 4 for Down Syndrome	37.230000
T21	AGE_C5	Age Risk Coefficient 5 for Down Syndrome	

PNS Interpretation Truncation Limits

7

Code	Parameter	Disease	Lower Limit	Upper Limit
AFP	AFP_TL	SLO	0.4000	2.0000
AFP	AFP_TL	T18	0.3300	2.0000
AFP	AFP_TL	T21	0.4000	3.0000
HCG	HCG_TL	SLO	0.3000	1.5000
HCG	HCG_TL	T18	0.2000	2.5000
HCG	HCG_TL	T21	0.4000	5.0000
HG1	HG1_TL	SLO	1.0000	1.0000
HG1	HG1_TL	T18	0.2000	1.0000
HG1	HG1_TL	T21	0.3000	3.0000
INH	INH_TL	SLO	0.8000	1.2000
INH	INH_TL	T18	0.8000	1.2000
INH	INH_TL	T21	0.3000	5.0000
NT	NT_TL	SLO	1.0000	1.0000
NT	NT_TL	T18	0.8000	2.2000
NT	NT_TL	T21	0.5000	2.5000
PA1	PA1_TL	SLO	1.0000	1.0000
PA1	PA1_TL	T18	0.3000	1.0000
PA1	PA1_TL	T21	0.2000	3.0000
UE3	UE3_TL	SLO	0.3000	1.0000
UE3	UE3_TL	T18	0.4000	1.4000
UE3	UE3_TL	T21	0.4000	2.0000

6. **PNS Interpretation Age Risk:** The Coef_Name and Coef_Val fields may be edited.
7. **PNS Interpretation Truncation Limits:** The Lower Limit and Upper Limit fields may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 5
PNS Interpretation Standard Deviation
8

Code	Parameter	Dating Method	Disease	Mean	Standard Deviation
AFP	NO_SLO	L	SLO	0.000000	0.152700
AFP	NO_SLO	N	SLO	0.000000	0.152700
AFP	NO_SLO	P	SLO	0.000000	0.152700
AFP	NO_SLO	U	SLO	0.000000	0.152700
HCG	NO_SLO	L	SLO	0.000000	0.226000
HCG	NO_SLO	N	SLO	0.000000	0.226000
HCG	NO_SLO	P	SLO	0.000000	0.226000
HCG	NO_SLO	U	SLO	0.000000	0.226000
INH	NO_SLO	L	SLO	0.000000	1.000000
INH	NO_SLO	N	SLO	0.000000	1.000000
INH	NO_SLO	P	SLO	0.000000	1.000000
INH	NO_SLO	U	SLO	0.000000	1.000000
UE3	NO_SLO	L	SLO	0.000000	0.135100
UE3	NO_SLO	N	SLO	0.000000	0.135100
UE3	NO_SLO	P	SLO	0.000000	0.135100
UE3	NO_SLO	U	SLO	0.000000	0.135100
AFP	NO_T18	L	T18	0.000000	0.197600
AFP	NO_T18	N	T18	0.000000	0.197600
AFP	NO_T18	P	T18	0.000000	0.197600
AFP	NO_T18	U	T18	0.000000	0.197600
HCG	NO_T18	L	T18	0.000000	0.241900
HCG	NO_T18	N	T18	0.000000	0.241900
HCG	NO_T18	P	T18	0.000000	0.241900
HCG	NO_T18	U	T18	0.000000	0.241900
INH	NO_T18	L	T18	0.000000	1.000000
INH	NO_T18	N	T18	0.000000	1.000000
INH	NO_T18	P	T18	0.000000	1.000000
INH	NO_T18	U	T18	0.000000	1.000000
UE3	NO_T18	L	T18	0.000000	0.143700
UE3	NO_T18	N	T18	0.000000	0.143700
UE3	NO_T18	P	T18	0.000000	0.143700
UE3	NO_T18	U	T18	0.000000	0.143700
AFP	NO_T21	L	T21	0.000000	0.141700
AFP	NO_T21	N	T21	0.000000	0.139900
AFP	NO_T21	P	T21	0.000000	0.141700
AFP	NO_T21	U	T21	0.000000	0.139900
HCG	NO_T21	L	T21	0.000000	0.227900
HCG	NO_T21	N	T21	0.000000	0.227600
HCG	NO_T21	P	T21	0.000000	0.227900
HCG	NO_T21	U	T21	0.000000	0.227600
INH	NO_T21	L	T21	0.000000	0.207800
INH	NO_T21	N	T21	0.000000	0.207800
INH	NO_T21	P	T21	0.000000	0.207800
INH	NO_T21	U	T21	0.000000	0.207800
UE3	NO_T21	L	T21	0.000000	0.128400
UE3	NO_T21	N	T21	0.000000	0.114200
UE3	NO_T21	P	T21	0.000000	0.128400
UE3	NO_T21	U	T21	0.000000	0.114200
AFP	SLO_PP	L	SLO	-0.142700	0.146500
AFP	SLO_PP	N	SLO	-0.142700	0.146500
AFP	SLO_PP	P	SLO	-0.142700	0.146500
AFP	SLO_PP	U	SLO	-0.142700	0.146500
HCG	SLO_PP	L	SLO	-0.119200	0.315900
HCG	SLO_PP	N	SLO	-0.119200	0.315900
HCG	SLO_PP	P	SLO	-0.119200	0.315900
HCG	SLO_PP	U	SLO	-0.119200	0.315900
INH	SLO_PP	L	SLO	0.000000	1.000000
INH	SLO_PP	N	SLO	0.000000	1.000000
INH	SLO_PP	P	SLO	0.000000	1.000000
INH	SLO_PP	U	SLO	0.000000	1.000000

8. **PNS Interpretation Standard Deviation:** The Mean and Standard Deviation fields may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 6
PNS Interpretation Correlations
9

Disease	Relationship Type	Selection Method	Selection Criterion	Analyte	Correlated Analyte	Value
SLO	NO_SLO	DM	L	AFP	HCG	0.09500
SLO	NO_SLO	DM	L	AFP	INH	0.00000
SLO	NO_SLO	DM	L	AFP	UE3	0.31400
SLO	NO_SLO	DM	N	AFP	HCG	0.09500
SLO	NO_SLO	DM	N	AFP	INH	0.00000
SLO	NO_SLO	DM	N	AFP	UE3	0.31400
SLO	NO_SLO	DM	P	AFP	HCG	0.09500
SLO	NO_SLO	DM	P	AFP	INH	0.00000
SLO	NO_SLO	DM	P	AFP	UE3	0.31400
SLO	NO_SLO	DM	U	AFP	HCG	0.09500
SLO	NO_SLO	DM	U	AFP	INH	0.00000
SLO	NO_SLO	DM	U	AFP	UE3	0.31400
SLO	SLO_PP	DM	L	AFP	HCG	0.22300
SLO	SLO_PP	DM	L	AFP	INH	0.00000
SLO	SLO_PP	DM	L	AFP	UE3	0.37600
SLO	SLO_PP	DM	N	AFP	HCG	0.22300
SLO	SLO_PP	DM	N	AFP	INH	0.00000
SLO	SLO_PP	DM	N	AFP	UE3	0.37600
SLO	SLO_PP	DM	P	AFP	HCG	0.22300
SLO	SLO_PP	DM	P	AFP	INH	0.00000
SLO	SLO_PP	DM	P	AFP	UE3	0.37600
SLO	SLO_PP	DM	U	AFP	HCG	0.22300
SLO	SLO_PP	DM	U	AFP	INH	0.00000
SLO	SLO_PP	DM	U	AFP	UE3	0.37600
T18	NO_T18	DM	L	AFP	HCG	0.03380
T18	NO_T18	DM	L	AFP	INH	0.00000
T18	NO_T18	DM	L	AFP	UE3	0.23210
T18	NO_T18	DM	N	AFP	HCG	0.03380
T18	NO_T18	DM	N	AFP	INH	0.00000
T18	NO_T18	DM	N	AFP	UE3	0.23210
T18	NO_T18	DM	P	AFP	HCG	0.03380
T18	NO_T18	DM	P	AFP	INH	0.00000
T18	NO_T18	DM	P	AFP	UE3	0.23210
T18	NO_T18	DM	U	AFP	HCG	0.03380
T18	NO_T18	DM	U	AFP	INH	0.00000
T18	NO_T18	DM	U	AFP	UE3	0.23210
T18	T18_PP	DM	L	AFP	HCG	0.03140
T18	T18_PP	DM	L	AFP	INH	0.00000
T18	T18_PP	DM	L	AFP	UE3	0.25010
T18	T18_PP	DM	N	AFP	HCG	0.03140
T18	T18_PP	DM	N	AFP	INH	0.00000
T18	T18_PP	DM	N	AFP	UE3	0.25010
T18	T18_PP	DM	P	AFP	HCG	0.03140
T18	T18_PP	DM	P	AFP	INH	0.00000
T18	T18_PP	DM	P	AFP	UE3	0.25010
T18	T18_PP	DM	U	AFP	HCG	0.03140
T18	T18_PP	DM	U	AFP	INH	0.00000
T18	T18_PP	DM	U	AFP	UE3	0.25010
T21	NO_T21	DM	L	AFP	HCG	0.13360

9. **PNS Interpretation Correlations:** The value field may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 7

PNS Interpretation Parameter Type

10

Parameter	Parameter Description	Parameter Type
ADJ_IN	Adjustment Intercept	WT_ADJ_INTERCEPT
ADJ_SL	Adjustment Slope	WT_ADJ_SLOPE
AFP_TL	Truncation Limits MoM AFP	TRUNCATION_LIMIT
AGE_C1	Age Risk Coefficient 1 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C2	Age Risk Coefficient 2 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C3	Age Risk Coefficient 3 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C4	Age Risk Coefficient 4 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C5	Age Risk Coefficient 5 For Down Syndrome Screening	RISK_COEFFICIENT
EAF_FR	Asian Factor UE3	RACE_ADJUSTMENT_FACTOR
EBF_FR	Black Factor AFP	RACE_ADJUSTMENT_FACTOR
EEA_FR	Eas Asian Factor HCG	RACE_ADJUSTMENT_FACTOR
EHF_FR	Hispanic Factor UE3	RACE_ADJUSTMENT_FACTOR
ESA_FR	Sotheast Asian Factor HCG	RACE_ADJUSTMENT_FACTOR
HCG_TL	Truncation Limits MoM HCG	TRUNCATION_LIMIT
HG1_TL	Truncation Limits MoM HCG1	TRUNCATION_LIMIT
IDD_FR	Insulin Dependent Diabetic Factor	ADJUSTMENT_FACTOR
INH_TL	Truncation Limits MoM INH	TRUNCATION_LIMIT
MED_C1	Median Coefficient 1	MEDIAN_COEFFICIENT
MED_C2	Median Coefficient 2	MEDIAN_COEFFICIENT
MED_C3	Median Coefficient 3	MEDIAN_COEFFICIENT
MED_IN	Median Intercept	MEDIAN_INTERCEPT
MED_SL	Median Slope	MEDIAN_SLOPE
NO_SLO	Population Not affected by SLOS disease	POPULATION_TYPE
NO_T18	Population Not affected by T18 - Edward Syndrome disease	POPULATION_TYPE
NO_T21	Population Not affected by T21- Down Syndrome disease	POPULATION_TYPE
NT_TL	Truncation Limits MoM NT	TRUNCATION_LIMIT
PA1_TL	Truncation Limits MoM PAPP-A	TRUNCATION_LIMIT
SLO_PP	SLOS affected Population	POPULATION_TYPE
SMK_FR	Smoking Factor	ADJUSTMENT_FACTOR
T18_PP	T18 affected Population	POPULATION_TYPE
T21_PP	T21 Down Syndrome Population	POPULATION_TYPE
TWN_FR	Twin Factor	ADJUSTMENT_FACTOR
UE3_TL	Truncation Limits MoM UE3	TRUNCATION_LIMIT
V_MEAN	Mean	MEAN
V_STDV	Standard Deviation	STANDARD_DEVIATION

10. **PNS Interpretation Parameter Type:** No fields are editable on this screen.

Maintain PNS Interpretation Parameters (continued)

FIGURE 8

11

PNS Interpretation Partial Panel Logic

CVS Fetus Panel Code	NTD Logic	T21 Logic	T18 Logic	SLO Logic	T21 RSK CUTOFF	T18 RSK CUTOFF	SLO RSK CUTOFF
N M 1	0	0	0	0	150	100	250
N M 2	0	0	0	0	150	100	250
N M 3	0	0	0	0	150	100	250
N M 4	0	0	0	0	150	100	250
N M 5	0	0	0	0	150	100	250
N M 6	0	0	0	0	150	100	250
N M 7	0	Y	0	0	150	100	250
N M 8	0	0	0	0	150	100	250
N M 9	0	0	0	0	150	100	250
N M 10	0	0	0	0	150	100	250
N M 11	Y	Y	0	0	150	100	250
N M 12	0	0	0	0	150	100	250
N M 13	Y	Y	0	0	150	100	250
N M 14	Y	Y	0	0	150	100	250
N M 15	Y	Y	0	0	150	100	250
N M 16	0	0	0	0	200	100	250
N M 17	0	0	0	0	200	100	250
N M 18	0	0	0	0	200	100	250
N M 19	0	0	0	0	200	100	250
N M 20	0	0	0	0	200	100	250
N M 21	0	0	0	0	200	100	250
N M 22	0	0	0	0	200	100	250
N M 23	0	Y	0	0	200	100	250
N M 24	0	0	0	0	200	100	250
N M 25	0	0	0	0	200	100	250
N M 26	0	0	0	0	200	100	250
N M 27	Y	Y	0	0	200	100	250
N M 28	0	0	0	0	200	100	250
N M 29	Y	Y	0	0	200	100	250
N M 30	Y	Y	0	0	200	100	250
N M 31	Y	Y	0	0	200	100	250
N M 32	0	0	0	0	200	100	250
N M 33	0	0	0	0	200	100	250
N M 34	0	0	0	0	200	100	250
N M 35	0	0	0	0	200	100	250
N M 36	0	0	0	0	200	100	250

11. **PNS Interpretation Partial Panel Logic:** NTD Logic, T21 Logic, T18 Logic, SLO Logic, T21 Risk Cutoff, T18 Risk Cutoff, SLO Risk Cutoff fields may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 9

12

PNS Interpretation Parameter Disease

Situation Code	Disease Code	Trimester Risk	Mr Risk Lwr Lmt	Mr Risk Up Lmt
I	NTD			
Q	NTD			
S	NTD			
T	NTD			
I	SLO	1.000000	10.000000	10000.000000
Q	SLO	1.000000	10.000000	10000.000000
S	SLO	1.000000	10.000000	10000.000000
T	SLO	1.000000	10.000000	10000.000000
F	T18	3.000000	3.000000	100000.000000
I	T18	3.000000	3.000000	100000.000000

12. **PNS Interpretation Parameter Disease:** The Trimester Risk, Mr Risk Lwr Lmt and Mr Risk Up Lmt fields may be edited.

13

PNS Interpretation Race and Ethnicity Adjustments

Analyte	Ethnicity	Adjustment	Priority
AFP	WHITE	0.940000	11
AFP	CHINESE	0.910000	4
AFP	FILIPINO	0.931000	9
AFP	MIDDLE EASTERN	0.930000	12
AFP	BLACK	0.857000	1
AFP	JAPANESE	0.910000	2
AFP	VIETNAMESE	0.931000	8
AFP	INDIAN SUBCONT.	1.000000	16
AFP	HISPANIC/LATINA	0.980000	10
AFP	KOREAN	0.890000	3

13. **PNS Interpretation Race and Ethnicity Adjustments:** Adjustment and Priority fields may be edited.

14

PNS Interpretation 1st Trimester Standard Deviation

Disease	Relationship Type	Selection Method	Selection Criterion	Analyte	Intercept	Slope	Standard Deviation
T18	NO_T18	DM	L	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	L	PA1	0.00000	0.00000	0.24950
T18	NO_T18	DM	N	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	N	PA1	0.00000	0.00000	0.24950
T18	NO_T18	DM	P	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	P	PA1	0.00000	0.00000	0.24950
T18	NO_T18	DM	U	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	U	PA1	0.00000	0.00000	0.24950
T18	NO_T18	GW	10	NT	0.00000	0.00000	0.13250
T18	NO_T18	GW	11	NT	0.00000	0.00000	0.13250

14. **PNS Interpretation 1st Trimester Standard Deviation:** Intercept, Slope and Standard Deviation fields may be edited.

PNS Interpretation CRL to GA Conversions **15**

CRL	GA
2	5.7
3	5.9
4	6.1
5	6.2
6	6.4
7	6.6
8	6.7
9	6.9
10	7.2
11	7.2
12	7.4
13	7.5
14	7.7
15	7.9
16	8.0

15. PNS Interpretation CRL to GA Conversions: GA field maybe edited.

117	17.6
118	17.7
119	17.8
120	17.9
121	18.0

Save Cancel **16**

16. Buttons:

- Save:** Updates any changes made to the interpretation parameters.
- Cancel:** Disregards any changes and directs you to the interpretation parameters.

Maintain Proficiency Test

Utilities >> Maint Profic Test

This screen will allow you to enter accession numbers for specimens received from outside agencies, such as the Center for Disease Control (CDC). These specimens will be tested, but the information associated with the samples is for proficiency testing purposes only. These specimens are identified separately so that they are excluded from GDB case reports or other normal processes.

Utilities >> Maint Profic Test

* Accession Number:

Accession Number	Entry Date	Entered By
217-53-023/21-2004-12	11/11/2004 6:14:58 PM	
217-91-024/21-2004-12	11/11/2004 6:14:58 PM	
217-30-025/21-2004-12	11/11/2004 6:14:58 PM	
217-68-026/21-2004-12	11/11/2004 6:14:58 PM	
217-07-027/21-2004-12	11/11/2004 6:14:58 PM	
217-19-028/21-2004-71	11/11/2004 6:14:58 PM	
217-57-029/21-2004-71	11/11/2004 6:14:58 PM	
217-38-030/21-2004-71	11/11/2004 6:14:58 PM	
217-76-031/21-2004-71	11/11/2004 6:14:58 PM	
217-15-032/21-2004-71	11/11/2004 6:14:58 PM	
196-84-314/21-2004-11	11/4/2004 5:46:08 PM	
196-38-206/21-2004-11	11/3/2004 7:36:59 PM	
196-86-063/21-2004-11	11/3/2004 4:10:31 PM	

1 2 3 4

1. **Accession Number** for proficiency tests is a required field.
2. **Buttons:**
 - a. The **Save** button will add the Accession Number to the grid below.
 - b. The **Clear** button will clear the Accession Number field.
3. The grid displays the Proficiency Test information. First page of Proficiency Test cases (sorted on entry date in descending order) is displayed. Remaining pages can be viewed by clicking the page numbers below the grid.

Maintain Reference Tables

Utilities >> View Ref Tables >> Maint Reference Tbl

This screen allows you to add or update a reference table record.

Change Password
View All Users
Batch Run Time Rept
Assign CCC/Lab
Maint Time Parameter
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test

Utilities >> View Ref Tables >> Maint Reference Tbl

Maint Reference Tbl

Select	PK	ADT	STUS	ID	ADT	STUS	DSCRE	FCTV	STRT	DT	FCTV	END	DT	SORT	ORDR	DEL	FLAG	CRTD	BY	CRTD	DT	U	
<input type="radio"/>	1						Scheduled		1/1/1901	12:00:00	AM	12/31/9999	12:00:00	AM	1		N	1		1/1/1901	12:00:00	AM	1
<input type="radio"/>	2						Performed		1/1/1901	12:00:00	AM	12/31/9999	12:00:00	AM	2		N	1		1/1/1901	12:00:00	AM	1

New Update Back

3589::msc
01/25/2005
19:53:51.453

- The data grid contains a list of reference table records.
- Buttons:**
 - New** – Add a record to the table.
 - Update** – Select a record by clicking the associated radio button and click the Update button to edit an existing record.
 - Back** – returns to the previous screen.

Maintain Relationships

Entity >> Entity Profile >> Maint Relationships

The **Maint Relationships** screen is used to create a new relationship between two entities and edit existing relationships. Only users with security settings for NT Practitioners can maintain relationship information for NT Practitioners. Refer to Appendix F – Entity Relationship Matrix to see the types of relationships that can be created between different entity types.

FIGURE 1

Entity Search
Entity Profile

Entity >> Entity Profile >> Maint Relationships

View Address **Entity Relation** **Maintain CEU's** **License** **Certification**

Entity Services **Cond for PDC Approval**

Create Relationship For

Entity ID: 113 Entity Code: 75e
Entity Name: Kaiser--San Francisco
Medical License #:
Address: 2425 Geary Blvd San Francisco CA 94115 3358

Relationship To

* Relationship Type: Emloys
Entity Type: Person
Entity Name: BorisBecker Search For Entity
Entity Code:
Address: 211 Shoreline Ct RichmondCA 94804
Role: Genetic Counselor
* Program Area: PNS
Entity ID: 3355
* Start Date: 07-28-2004
End Date:
* Status: Active

3529::qaadmin
01/12/2005
13:55:53.267

1. Information about the selected entity is displayed in a read-only format based on the Entity Profile.
2. You must use the **Search For Entity** link to find the entity to which you are creating a relationship.
3. Information about the entity you select will be displayed in the **Relationship To** section in read-only format.
4. Enter information about the relationship in the fields provided. **Program Area**, **Start Date** and relationship **Status** are required fields. If an **End Date** is not selected it will default to "12/31/9999".

Maintain Relationships (continued)

FIGURE 2

Contact Information

Phone Number: -- Ext. :

Fax: -- Ext. :

Email:

Use Preferred Address: ☐

Current Relationships

Entity	Address	Role	Relation	Entity To	Contact Type	Address (Entity To)	Start Date	End Date	Status	Updated By	Last Updated
<input type="radio"/> Kaiser-- San Francisco	2425 Geary Blvd San Francisco CA 94115 3358	Clinical Geneticist	Employs	Monica Seles	Physical Location	200 Lakeshore Ct Richmond CA 94804 7423	7/28/2004		Active	System	7/28/2004
<input type="radio"/> Kaiser-- San Francisco	2425 Geary Blvd San Francisco CA 94115 3358	Genetic Counselor	Employs	Boris Becker	Physical Location	211 Shoreline	7/28/2004		Active		

5. Provide **Contact Information** pertinent to the relationship.
6. **Buttons:**
 1. Click the **Save** button to save the relationship information you entered. A row will be added to the Current Relationships grid.
 2. Click the **Clear** button to clear the contents of the fields discarding any changes you made.
 3. Click the **Cancel** button to return to the Entity Relation screen, discarding any changes you made.
7. All relationships for the selected entity are displayed in the **Current Relationships** grid.
8. Click the radio button next to a relationship to select it for editing.
9. Click the **Edit** button to make changes to the selected relationship.

Maintain Valid PNS Form Number Range

Utilities » Maintain Valid PNS Form Number Range

On the **Maintain Valid PNS Form Number Range** screen you can Add or Update the Trimester, Form Type, Starting Sequence number and Ending Sequence number.

FIGURE 1

Utilities » Maintain Valid PNS Form Number Range

Select	Trimester	Form Type	Starting Sequence#	Ending Sequence#
<input type="radio"/>	1	1A	10000000	49999999
<input type="radio"/>	2	L	1	10000000
<input type="radio"/>	2	M	10000001	20000000
<input type="radio"/>	2	2A	20000001	49999999

Add Update

1. The trimester column can be selected from the grid.
2. **Buttons:**
 - d. The Add button allows user to enter valid PNS form number range.
 - e. The Update button allows user for updating the valid PNS form number range.

Maintain Valid PNS Form Number Range (continued)

Figure 2

GDB-SIS

Utilities > Maintain Valid PNS Form Number Range

Select	Trimester	Form Type	Starting Sequence#	Ending Sequence#
<input type="radio"/>	1	1A	10000000	49999999
<input type="radio"/>	2	L	1	10000000
<input type="radio"/>	2	M	10000001	20000000
<input type="radio"/>	2	2A	20000001	49999999

1

Enter Valid PNS Form Number Range

*Trimester:

*Form Type:

*Starting Sequence#:

*Ending Sequence#:

2

3

1. Grid that displays the existing form number ranges for each trimester.
2. If user clicks on Add button, Form Number Range fields will be blank and user need to enter all the required fields. Trimester, Starting Sequence and Ending Sequence are required fields.
3. **Buttons:**
 - a. Click the **Save** button to save the new form number range. A new row will be added to the Summary of form number ranges grid (Figure 1).
 - b. Click the **Cancel** button to discard any unsaved information and return to the previous screen.

Maintain Valid PNS Form Number Range (continued)

Figure 3

Utilities » Maintain Valid PNS Form Number Range

Select	Trimester	Form Type	Starting Sequence#	Ending Sequence#
<input checked="" type="radio"/>	1	1A	10000000	49999999
<input type="radio"/>	2	L	1	10000000
<input type="radio"/>	2	M	10000001	20000000
<input type="radio"/>	2	2A	20000001	49999999

1

Add Update

Enter Valid PNS Form Number Range

*Trimester:

*Form Type:

*Starting Sequence#:

*Ending Sequence#:

2

Save Cancel **3**

1. Grid that displays the existing form number ranges for each trimester.
2. If user clicks Update button, form number range fields will displays with existing information and allows the user for editing.
3. **Buttons:**
 - a. Click the **Save** button to save the updated information.
 - b. Click the **Cancel** button to discard any unsaved information and return to the previous screen.

MC Annual Patient Summary

Data Intake >> MC Annual Patient Summary

The MC Annual Patient Summary screen captures the patient summary forms that are completed yearly by Metabolic Centers on each of their patients. These forms capture the general health and any treatments performed on children who have metabolic disorders for the first six years of their lives.

FIGURE 1

Client/Case Search
Id Search
View Client Profile
Specimen History
TRF Data Entry (NBS)
Case Summary (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Addl Test Results
Audit Data Entry
Expected Recall (NBS)
Case Resolution
MPKU Registry Search
Metabolic Service Report
Reassign MC
Cystic Fibrosis Service Report
Reassign CF
MS/MS Ref Lab Expcd
Expected Phe Monitoring
Enter Other Mutation Test Results
MC Annual Patient Summary
CFC Annual Patient Summary
View CFF File Records
Biotinidase Expected List

Data Intake >> MC Annual Patient Summary

Client Name: BROWN Date of Birth: 9/2/2005
Accession Number: 248-47-188/21-2005-22

Metabolic Center Annual Patient Summary History

Select	Date	UserID	Case Status
C	02/26/2007	Lgaffney	Active - patient currently being seen at this center

New View Update

Cancel

1. Displays client and case information in read-only format.
2. **Metabolic Center Annual Patent Summary History:** Lists all MC annual patient summaries that have been completed for the client in the grid. Use the **Select** radio button to indicate the specific annual patient summary to be displayed.
3. **Buttons:**
 - a. **New:** Displays a new, blank annual patient summary form for the patient.
 - b. **View:** Displays the annual patient summary selected in the grid in read-only mode.
 - c. **Update:** Displays the annual patient summary selected in the grid in update mode.
 - d. **Cancel:** Refreshes the screen.

MC Annual Patient Summary (continued)

FIGURE 2

The screenshot shows the 'MC Annual Patient Summary' form. On the left is a blue sidebar with navigation links. The main form area contains sections for 'Patient Information' and 'Follow-up Status'. Numbered callouts (4-8) point to specific fields: 4 points to the 'Date' and 'User Id' fields; 5 points to the 'Patient Information' section header; 6 points to the address validation section; 7 points to the telephone number section; and 8 points to the 'Follow-up Status' dropdown menu.

Cystic Fibrosis Service Report
 Reassign CF
 MS/MS Ref Lab Expctd
 Expected Phe Monitoring
 Enter Other Mutation Test Results
MC Annual Patient Summary
 CFC Annual Patient Summary
 View CFF File Records
 Biotinidase Expected List

Date: 02/26/2007
 User Id: Lgaffney

Patient Information

Age of Child Today: 2 years old
 Last known patient address and telephone number on record: 655 Fair Oaks Ave Apt 561 Santa Ana California CA 92701-5882 (714) 542 2137

*As far as you know, is this still the patient's address?: Yes
 If no, please provide patient's new address:
 Address (Number , Street):
 Address (Apt / Suite #):
 City:
 State: Select
 Zip: -
☐ Do not validate address

*As far as you know, is this still the patient's telephone number?: Yes
 If no, please provide patient's new home telephone number: - - x -

*Follow-up Status: Active - patient currently being seen at this center
 Date (month/year):
 If transferred, indicate new center: Select
 If patient died, indicate date of death: - -
 Was death a result of a complication of 3-methylcrotonyl-CoA carboxylase deficiency (3MCC deficiency)?:
 Cause of Death:

4. Displays the current date and logged in user id.
5. **Patient Information:** Captures patient contact information and high level details regarding the patient's case.
6. Select whether the patient's address is up-to-date. If it is not current, enter the current address, city, state and zip code in the fields that follow. If you prefer that the address not be validated against the post office's addresses for accuracy, check the **Do not validate address** checkbox.
7. Select whether the patient's telephone number is up-to-date. If it is not current, enter the current telephone number in the fields that follow.
8. **Follow-Up Status:** Select the follow-up status for the patient.
 - a. If the follow-up status is Transferred, enter the date of the transfer in the **Date (month/year)** fields, and enter the location to which the patient was transferred in the **If Transferred, indicate new center** field.
 - b. If the follow-up status is Lost to follow-up, enter the date the patient was lost to follow-up in the **Date (month/year)** fields.

MC Annual Patient Summary (continued)

- c. If the follow-up status is Moved out of state, enter the date the patient moved out of California in the **Date (month/year)** fields.
- d. If the follow-up status is Refused follow-up, enter the date the patient refused follow-up in the **Date (month/year)** fields.
- e. If the follow-up status is Treatment deemed not necessary, enter the date the treatment was deemed unnecessary in the **Date (month/year)** fields.
- f. If the follow-up status is Patient died, enter the date death, using the calendar if desired. Indicate whether the death was the result of a complication of the child's metabolic disorder. If not, enter the actual cause of death in the blank box provided.

MC Annual Patient Summary (continued)

FIGURE 3

Services provided **9**

*Services provided by your metabolic center in the previous year (09/02/2005 through 09/02/2006):

☐ Genetic Counseling

☐ Health education

☐ Social Services

☐ Other

☐ Nutritional advice

☐ Laboratory tests

☒ Physical Examination **10**

* Date of last visit/interaction with patient that occurred in the previous year (09/02/2005 through 09/02/2006): -- **11**

☒ N/A

* Total number of patient visits to your metabolic center in the previous year (09/02/2005 through 09/02/2006): 2

* Total number of hospitalizations in the previous year (09/02/2005 through 09/02/2006): 2

If more than 0, indicate date of admission, total days hospitalized and reason for admission:

Admission Date: --

Total Days Hospitalized:

Reason:

Admission Date	Total Days Hospitalized	Reason

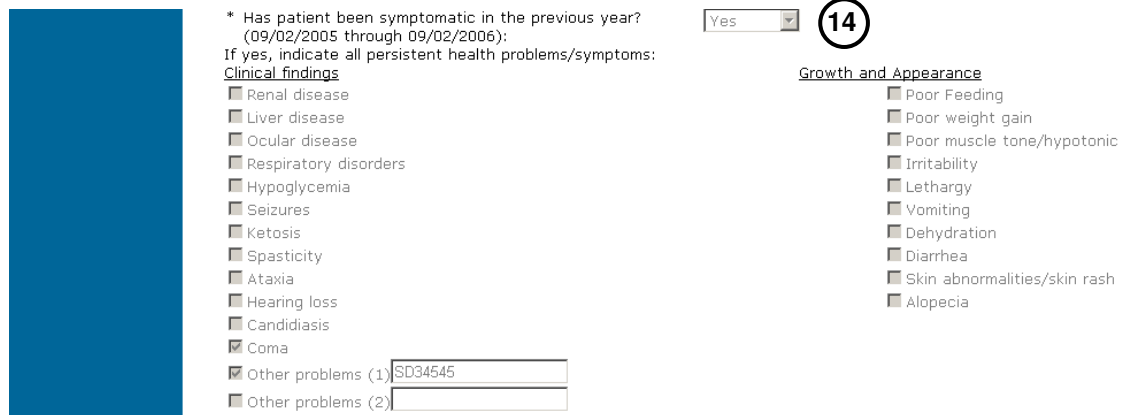
12

* Total number of emergency room visits due to Biotinidase deficiency in the previous year (09/02/2005 through 09/02/2006): 2 **13**

9. **Services Provided:** Captures all of the services that were provided to a patient within a specified time frame.
10. Check the services that were provided to the patient in the specified time frame. If services other than those listed on the screen were provided, check the **Other** checkbox, and specify the details of the service in the blank box that follows.
11. Determine when the last interaction with the patient occurred.
 - a. If there was at least one interaction within the specified time frame, enter the date that the most recent of interaction with the patient occurred, as well as the total number of visits to the center in the specified time frame. If desired, use the calendar icon to fill in dates.
 - b. If there were no interactions with the patient within the specified time frame, check **N/A**.
12. Enter the total number of times the patient was hospitalized within the specified time frame. If the patient was hospitalized at least once within the specified time frame, enter the details of each stay in the fields that follow. For each stay:
 - a. Enter the date the patient was admitted. If desired, use the calendar icon.
 - b. Enter the total number of days the patient was hospitalized
 - c. Enter the **Reason** for the hospitalization.
 - d. Click the **Add to Grid** button. This will add the details of the stay to the grid below.
13. Enter the number of times the patient visited the emergency room for the metabolic disorder specified within the specified time frame.

MC Annual Patient Summary (continued)

FIGURE 4



* Has patient been symptomatic in the previous year?
(09/02/2005 through 09/02/2006): **14**

If yes, indicate all persistent health problems/symptoms:

Clinical findings

- ☐ Renal disease
- ☐ Liver disease
- ☐ Ocular disease
- ☐ Respiratory disorders
- ☐ Hypoglycemia
- ☐ Seizures
- ☐ Ketosis
- ☐ Spasticity
- ☐ Ataxia
- ☐ Hearing loss
- ☐ Candidiasis
- ☒ Coma
- ☒ Other problems (1)
- ☐ Other problems (2)

Growth and Appearance

- ☐ Poor Feeding
- ☐ Poor weight gain
- ☐ Poor muscle tone/hypotonic
- ☐ Irritability
- ☐ Lethargy
- ☐ Vomiting
- ☐ Dehydration
- ☐ Diarrhea
- ☐ Skin abnormalities/skin rash
- ☐ Alopecia

14. Select from dropdown box whether the patient has been symptomatic in the previous year. If the patient has been symptomatic, indicate persistent health problems as follows:
 - a. Check the **Clinical Findings** diagnosed for the patient. If findings other than those listed on the screen were identified, check the first available **Other problems** checkbox, and specify the finding in the blank box that follows.
 - b. Check the **Growth and Appearance** findings diagnosed for the patient.

MC Annual Patient Summary (continued)

FIGURE 5

Treatments/therapies/strategies 15

Treatments/Therapies/Strategies prescribed in previous year (09/02/2005 through 09/02/2006):

☐ Medications/prescription drugs
If checked, was patient compliant with regimen? Select ▼

☐ Medical foods/supplements/special formulas
If checked, was patient compliant with regimen? Select ▼

☐ Vitamins
If checked, was patient compliant with regimen? Select ▼

☐ Renal dialysis
If checked, was patient compliant with regimen? Select ▼

☐ Parenteral feeding
If checked, was patient compliant with regimen? Select ▼

☐ Enteral feeding
If checked, was patient compliant with regimen? Select ▼

☐ Transplantation - Kidney

☐ Transplantation - Liver

☐ Skilled nursing care required at home

☐ Other treatments/therapies (1)

☐ Other treatments/therapies (2)

15. Check all treatments that were prescribed to the patient in the specified time frames. If treatments other than those listed on the screen were performed, check the first available **Other treatments/therapies** checkbox, and specify the type of therapy in the blank box that follows.
 - a. For each treatment, select whether the patient was compliant with the regimen.

MC Annual Patient Summary (continued)

FIGURE 6

Health Status

Assessment of patient's development and function at patient's last visit/interaction:

*Physical Growth: Mild delay

*Mental/Cognitive: Moderate delay

*Speech/Language: Mild delay

*Gross Motor skills: Moderate delay

*Fine Motor skills: Mild delay

In the previous year was there a loss of skills that had been previously achieved?: Select

*Global Health Assessment: Select the number that describes the overall health status of the patient at the last visit (compared to a typical child without Biotinidase deficiency): 5 - very good

Comments:

Save Cancel

16. **Health Status:** Captures the patient's overall health within the specified time frame. For the specified time frame:
 - a. Select the appropriate assessment of the child's **Physical Growth**.
 - b. Select the appropriate assessment of the child's **Mental/Cognitive** skills.
 - c. Select the appropriate assessment of the child's **Speech/Language** skills.
 - d. Select the appropriate assessment of the child's **Gross Motor skills**.
 - e. Select the appropriate assessment of the child's **Fine Motor skills**.
 - f. Select whether there has been any loss of skills in the previous year.
17. Select the overall health status of the patient at the last visit, by comparing the patient's health against a child who does not have the metabolic disorder. Enter any **Comments**.
18. **Buttons:**
 - a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated MSR appears in the **Metabolic Center Annual Patient Summary History** grid that is displayed.
 - b. **Cancel:** Restores the screen with data that existed on the screen after the Save button was last clicked.

MC Annual Patient Summary Case List

Follow Up Center >> MC Annual Summary Case List

The **MC Annual Patient Summary Case List** screen displays all clients who require an annual patient summary from a metabolic center. The MC Annual Patient Summary is due annually, during the month after a child's birthday.

FIGURE 1

Follow Up Center » MC Summary Case List

View Metabolic Center Annual Patient Summary Case List

Select	Accession Number	Last Name, First Name	AKA	Date Of Birth	Diagnosed Disorder
<input type="radio"/>	007-09-227/21-2004-12	Green, Gavin		01/04/2004	Disorder
<input type="radio"/>	017-01-255/21-2006-12	BECKER		01/13/2006	Disorder

lgaffney.:MC84
03/27/2009
00:00:00.000

1
Select

1. **View Metabolic Center Annual Summary Case List:** Lists all clients who satisfy the following conditions:
 - a. The client's case belongs to the user's metabolic center
 - b. The client's case is resolved as "Resolved Disorder" on the client's most current MSR
 - c. The client's case is active (i.e. The patient has no previous annual reports OR the Follow up Status on the patient's most current annual report is Active or Transferred)
 - d. The child is within the first six years of his/her life
 - e. An annual patient summary has not been filed for the patient at that age
 - f. The case/client is not already listed in the grid
 - g. The patient is alive

The cases are removed from the list after an annual patient summary has been entered for the patient for that age.
2. **Buttons:**
 - a. **Select:** Navigates to the MC Annual Patient Summary screen where it displays a list of annual patient summaries completed for the patient selected in the grid.
3. Click the appropriate **Accession Number** hyperlink on the grid to view the **Case Summary** screen for the case.

MC (Metabolic Center) Reporting

Data Intake >> MC Reporting

This screen is used to identify the metabolic follow up services provided for a client at a metabolic center. There are multiple ways to access this screen including clicking MC Reporting on the 2nd level link of the Case Summary (NBS) screen.

FIGURE 1

Client Name: AksheyB, BchinniB Date of Birth: 275-39-300/21-2004-12

Metabolic Follow-up Services Center Reporting History

No records found

General Information

Metabolic Center Code: 94
 Metabolic Center Name: Kaiser South
 *Case Status: Pending
 Disorder: Select
 Patient's First Name: BchinniB
 Patient's Last Name: AksheyB
 Date of Birth: 01-01-11
 *Date of Contact:
 *Contact Type: Select
 *Contact Mode: Select

Provider(s)

Check All That Apply	Provider(s)
<input type="checkbox"/>	Metabolic Specialist
<input type="checkbox"/>	Dietician
<input type="checkbox"/>	Nurse
<input type="checkbox"/>	Social Worker
<input type="checkbox"/>	Genetic Counselor
<input type="checkbox"/>	Other(1)
<input type="checkbox"/>	Other(2)

1. Client information is displayed in a read-only format, based on the client profile.
2. Records are displayed in the **Metabolic Follow-up Services Center Reporting History** if there are previous service entries for the client record.
3. **Case Status**, **Date of Contact**, **Contact Type** and **Contact Mode** are required fields.
4. **Provider(s)** grid displays all types of specialists that provide patient services. Identify the provider(s) for this case by clicking the checkbox next to the provider's record in the **Check All That Apply** column.

MC (Metabolic Center) Reporting (continued)

FIGURE 2

3349::nbs001
 04/12/2005
 19:36:00.000

Tests/Procedures Ordered 5

☐ Phenylalanine
☐ Bioplerin - Urine
☐ Acylcarnitine profile
☐ Amino acids - Urine
☐ Blood gas/electrolytes
☐ Enzyme analysis
☐ Ketones - Urine
☐ Methylmalonate - Blood
☐ Tissue assay/fibroblast/lymphocyte

☐ Tyrosine
☐ Transferase electrophoresis
☐ Acylglycines - Urine
☐ Ammonia
☐ Carnitines
☐ Glucose
☐ Lactate/Pyruvate
☐ Methylmalonate - Urine

☐ Bioplerin - Blood
☐ Gal-1-P
☐ Amino acids - Plasma
☐ B vitamins
☐ DNA
☐ Homocysteine - Plasma/urine
☐ Liver function panel
☐ Organic acids - Urine

Treatment Initiated or Changed 6

Check All That Apply	Treatment	Date
<input type="checkbox"/> 1	Referral to Other Specialist	<input type="text" value="MM/DD/YYYY"/>
<input type="checkbox"/> 2	Medications	<input type="text" value="MM/DD/YYYY"/>
<input type="checkbox"/> 3	Medical Food Supplements/Special Formula	<input type="text" value="MM/DD/YYYY"/>
<input type="checkbox"/> 4	Vitamin/Enzyme Supplements	<input type="text" value="MM/DD/YYYY"/>
<input type="checkbox"/> 5	Dietary Restrictions	<input type="text" value="MM/DD/YYYY"/>

Health Status/Outcomes 7

Global Health Assessment

Health Problems

☐ No Unusual Symptoms
☐ Poor Muscle Tone
☐ Poor Feeding
☐ Developmental Delay
☐ Poor Weight Gain
☐ Poor Muscle Tone/Hypotonic
☐ Vomiting
☐ Irritability
☐ Dehydration
☐ Seizures
☐ Lethargy
☐ Other

Specify If Other 8

5. **Tests/Procedures Ordered** section displays all types of tests that may be ordered for a patient. Identify the tests or procedures for this case by clicking the checkbox next to the name of the test or procedure.
6. **Treatment Initiated or Changed** grid displays all types of treatments that may be prescribed for a patient. Identify the treatment(s) for this case by clicking the checkbox next to the treatment name in the **Check All That Apply** column. Enter the date each prescribed treatment was initiated or changed in the **Date** column.
7. **Health Status/Outcomes** section displays all potential outcomes for a patient. Select the **Global Health Assessment** from the dropdown. Identify the detailed health status or outcome for this case by clicking the checkbox next to the name of the health status or outcome.
8. Click the **Save** button to save the changes. Click the **Cancel** button to cancel your actions without saving.

MC Reference Lab Expected List

This screen lists out all cases with a positive MS/MS disorder pattern. All the cases shown in the list will remain in until the CCC has resolved the case.

View MC Reference Lab Expected List ①

Accession Number	Last Name, First Name	Date of Collection	Gender	Date of Birth	Interpretation	CCC	Positive Pattern
194-65-170/21-2004-12	SUNNY, MARK	7/10/2004 12:00:00 AM	Male	7/8/2004 12:00:00 AM	Acylcarnitine: Negative, Amino acid: Positive	GENETIC DISEASE BRANCH - NBS	Phenylket
194-91-180/21-2004-12	BROWN, MINI	7/11/2004 12:00:00 AM	Female	7/9/2004 12:00:00 AM	Acylcarnitine: Negative, Amino acid: Positive	GENETIC DISEASE BRANCH - NBS	Phenylket
195-45-257/21-2004-11	Gonzalez, Baby	7/11/2004 12:00:00 AM	Female	7/9/2004 12:00:00 AM	Acylcarnitine: Negative, Amino acid: Positive	GENETIC DISEASE BRANCH - NBS	Phenylket
195-83-258/21-2004-11	BROWN, MARY	7/11/2004 12:00:00 AM	Female	7/9/2004 12:00:00 AM	Acylcarnitine: Negative, Amino acid: Positive	GENETIC DISEASE BRANCH - NBS	Phenylket
194-71-194/21-2004-12	CRAY, SAMANTHA	7/11/2004 12:00:00 AM	Female	7/9/2004 12:00:00 AM	Acylcarnitine: Negative, Amino acid: Positive	GENETIC DISEASE BRANCH - NBS	Phenylket
194-10-195/21-2004-12	CALLAHAN, ...	7/11/2004 ...	Female	7/10/2004 ...	Acylcarnitine: Negative, ...	GENETIC DISEASE ...	Phenylket

3464 : ConLabAdmin
07/24/2004
00:00:00.000

The **View MC Reference Lab Expected List** data grid displays all of the cases with a positive MS/MS disorder pattern.

Merge Entities

Entity >> Entity Profile >> Merge Entities

This screen allows you to view potential matches for a provider that does not match an existing record in SIS (i.e. one time providers or not currently active providers) and allows you to merge the entities if appropriate. Potential matches are active providers identified based on the license number, address, and name. Although this screen is used primarily for one-time providers, you are able to merge any type of entity as necessary.

You can access this screen from one of two places: 1) from the Entity Search screen when you have selected an entity record, and you click the Find Potential Match button, or 2) from the Entity Profile screen when you click the Merge Entities link.

When merging entities, the one time provider data is merged to the potential match entity. The potential match record will be updated and the one time provider record will be inactivated.

Merge Entities (continued)

FIGURE 1

Entity >> Entity Profile >> Merge Entities

View Address Entity Relation Maintain CEU's License Certification

Entity Services Merge Entities Cond for PDC Approval

Entity ID: 3802 Entity Code:

Entity Name: John, Robert

Entity Type: Person

Medical License Number:

Federal Tax ID:

Potential Matches

Entity ID	Entity Code	Name	Entity Type	License Number	License Status
<input type="checkbox"/> 851		ROBERT ALTMAN	Person		
<input type="checkbox"/> 374		ROBERT BARMMEYER	Person		
<input type="checkbox"/> 4094		ROBERT BITER	Person	A 077870	
<input type="checkbox"/> 6478		ROBERT BJORK	Person	A39787	
<input type="checkbox"/> 6485		ROBERT BJORK	Person		
<input type="checkbox"/> 6280		ROBERT BUTTS	Person	G 061735	
<input type="checkbox"/> 1500		ROBERT WILLYARD	Person	065000	

Enter Entity ID:

Display Details

1. The one time provider's basic information is pre-populated based on the data in the previous screen.
2. **Potential Matches** grid will be automatically loaded with any potential matches for the one time provider. To compare entity data with the one time provider's, check the box for the selected row and click the **Display Details** button.
3. Alternatively, if the potential matches grid does not find the entity you want to merge you can enter the entity's ID in the **Enter Entity ID** field and click the **Display Details** button.
4. **Display Details** button will populate the Merge Entity fields (see 5) allowing you to compare entity data using either an entity selected from the **Potential Matches** grid or from an Entity ID you entered.

Merge Entities (continued)

FIGURE 2

4092::msc
07/15/2004
00:00:00.000

Merge Entities

Entity Data

ONE TIME PROVIDER		POTENTIAL MATCH	
Entity ID:	<input type="text" value="3802"/>	Entity ID:	<input type="text"/>
Entity Code:	<input type="text"/>	*Entity Code:	<input type="text"/>
Name:	<input type="text" value="John,Robert"/>	Name:	<input type="text"/>
Entity Type:	<input type="text" value="Person"/>	Entity Type:	<input type="text" value="Select"/>
License Number:	<input type="text"/>	*License Number:	<input type="text"/>
Federal Tax ID:	<input type="text"/>	*Federal Tax ID:	<input type="text"/>

Contact Type	Address	Add
Physical Location	212 Marina Lakes Dr Richmond CA 94804	<input type="checkbox"/>

Contact Type	Address	Inactive
Physical Location	2 Marina Lakes Dr Richmond CA 94804	<input type="checkbox"/>

☒ Check this box, if this is not a One Time Provider

5. **Entity Data** for the one time provider and potential match are displayed for comparison after the **Display Details** button is clicked.
6. You may check the **Add** box to add the one time provider's address information to the potential match's information. Checking the **Add** box will also add the one time provider's telecom information to the potential match's information.
7. You may check the **Inactive** box to inactivate the potential match's current address information. Checking the **Inactive** box will also inactivate the potential match's telecom information.
8. **Check this box, if this is not a One Time Provider** is used to indicate that the one time provider should be identified in SIS as a regular, active provider. When checked, the one time match and potential match fields will no longer be editable. Every time the checkbox is changed, the record must be submitted to the database to save the changes. Clicking the Submit button at the bottom of the screen performs this action.

Merge Entities (continued)

FIGURE 3

The screenshot displays the 'Telecom Information' section of the Merge Entities screen. It features two side-by-side tables. The left table, titled 'ONE TIME PROVIDER', has columns 'Telecom Type' and 'Telecom Number' and is labeled with a circled '9'. The right table, titled 'POTENTIAL MATCH', has columns 'Existing Telecom Type' and 'Existing Telecom Number' and is labeled with a circled '10'. A circled '5' is located at the top right of the screen. At the bottom, there are three buttons: 'Save', 'Cancel', and 'Submit', with the 'Submit' button labeled with a circled '11'. A blue vertical bar is on the left side of the screen.

ONE TIME PROVIDER		POTENTIAL MATCH	
Telecom Type	Telecom Number	Existing Telecom Type	Existing Telecom Number

Save | Cancel | Submit

9. If the **Add** box above is checked (see 6), the one-time provider's telecom information will be added to the potential match's telecom information.
10. If the **Inactive** box above is checked (see 7), the potential match's telecom information will be inactivated.
11. **Buttons:**
 - a. **Save** button will merge the one time provider data to the potential match entity. The potential match record will be updated and the one time provider record will be inactivated. To check the status of the one time provider after the merge use the Entity Search screen to search for the one time provider and navigate to the View Entity Profile screen.
 - b. **Cancel** button will cancel an unsaved merge function and direct you to the Entity Search screen.
 - c. **Submit** button must be clicked after the **Check this box, if this is not a One Time Provider** checkbox is changed. The **Submit** button will allow the change to the checkbox to be saved to the database.

Metabolic Services Reporting Form

Data Intake >> Metabolic Service Report

The Metabolic Service Report screen is used to capture services provided at the Metabolic Center up until the point at which the child is diagnosed. All further follow-up will then be captured in the Annual Patient Summary screen. The user can navigate to this screen from the Case Summary or the Cases Referred screen.

FIGURE 1

GDB-SIS

Data Intake >> Metabolic Service Report

Client/Case Search
Id Search
View Client Profile
Specimen History
TRF Data Entry (NBS)
Case Summary (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Add Test Results
Audit Data Entry
Biotinidase Expected List
Expected Recall (NBS)
Case Resolution
MPKU Registry Search
Metabolic Service Report
Cystic Fibrosis Service Report
Reassign CF
Reassign MC
Enter Other Mutation Test Results
MS/MS Ref Lab Expected
MC Annual Patient Summary
Expected Phe Monitoring
CFC Annual Patient Summary
View CFF File Records
lgaffney.:001
04/18/2007
00:00:00.000

Data Intake Entity Monitor Follow Up Center CCC Utilities

Case Summary (NBS)
Re-assign CCC
Case Audit Results SCCC

Adequacy Status (NBS)
Tracking Events
Link NBS Accn Numbers

Case Notes
Appointments

Link Accn Numbers
Services History

Conf Test Results
Link Client to Entity

Client Name: MARIZOLLA
Accession Number: 274-60-036/21-2006-71

Date of Birth: 9/28/2006

Metabolic Follow-up Services Center Reporting History

Select:	Date of Contact	Contact Type	Contact Mode	Case Status	Disorder Entry Date	Entered By
<input type="radio"/>	02/14/2007	Follow-up visit/Interaction	Face to Face	Pending	04/18/2007	CFalk
<input type="radio"/>	01/10/2007	Initial visit/Interaction	Face to Face	Resolved - No Identified Disorder	04/18/2007	CFalk

New Update View

Cancel

- Client information is displayed in a read-only format, based on the client profile.
- Records are displayed in the **Metabolic Follow-Up Services Center Reporting History** if there are previous service entries for the client record. The screen above reflects what the screen looks like before any selection of radio buttons is made for the cases.
- Select a case by clicking the radio button and then selecting **New**, **Update**, or **View** buttons:
 - New:** Creates a new blank reporting form.
 - Update:** View the details of an already entered form which can be modified. This action is only accessible to security groups that have update access.
 - View:** View the details of an already entered form. This action is only accessible to security groups that have "read" access.
 - Cancel:** Cancels the current operation without saving.

Metabolic Services Reporting Form (continued)

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search
 View Client Profile
 Case Summary (NBS)
 View Edit Log
 Maint Client Relation
 Addl Test Results
 Biotinidase Expected List
 Metabolic Service Report
 Reassign MC
 MC Annual Patient Summary

Data Intake » Metabolic Service Report

Case Summary (NBS) Case Notes Conf Test Results Appointments Services History

Link Client to Entity Case Audit Results SCCC

Client Name: MARIZOLLA Date of Birth: 9/28/2006
 Accession Number: 274-60-036/21-2006-71

Metabolic Follow-up Services Center Reporting History

Select	Date of Contact	Contact Type	Contact Mode	Case Status	Disorder Entry Date	Entered By
<input checked="" type="radio"/>	02/14/2007	Follow-up visit/Interaction	Face to Face	Pending		04/18/2007 CFalk
<input type="radio"/>	01/10/2007	Initial visit/Interaction	Face to Face	Resolved - No Identified Disorder		04/18/2007 CFalk

General Information

Metabolic Center Code: MC85
 Metabolic Center Name: FRESNO MEDICAL GENETIC AND METABOLIC
 *Case Status: Pending
 Specify, if Case Status is Other:
 Disorder: Select
 Indicate genotype/known mutations:
 Date of Birth: 09 - 28 - 2006
 *Date of Contact: 02 - 14 - 2007
 *Contact Type: Follow-up visit/Interaction
 Specify, if other:
 *Contact Mode: Face to Face

4

4. **General Information: Case Status, Date of Contact, Contact Type and Contact Mode** are required fields. All required fields are denoted by the (*).

Metabolic Services Reporting Form (continued)

FIGURE 3

Provider(s) 5

Check All That Apply	Provider(s)
<input checked="" type="checkbox"/>	Metabolic Specialist
<input type="checkbox"/>	Medical Geneticist
<input type="checkbox"/>	Dietician
<input type="checkbox"/>	Nurse
<input type="checkbox"/>	Social Worker
<input type="checkbox"/>	Genetic Counselor
<input type="checkbox"/>	Other(1) <input type="text"/>
<input type="checkbox"/>	Other(2) <input type="text"/>

Service(s) Provided 6

Check All That Apply	Service(s)
<input checked="" type="checkbox"/>	Genetic Counseling
<input type="checkbox"/>	Nutrition Advice
<input type="checkbox"/>	Laboratory Tests
<input type="checkbox"/>	Social Services
<input type="checkbox"/>	Physical Examination
<input type="checkbox"/>	Health Education
<input type="checkbox"/>	Other <input type="text"/>

Tests/Procedures Ordered 7

<input type="checkbox"/> Acylcarnitine Profile – Plasma/serum	<input type="checkbox"/> Bone maturity study	<input type="checkbox"/> Liver function panel
<input type="checkbox"/> Acylcarnitine Profile – Urine	<input type="checkbox"/> Carnitines	<input type="checkbox"/> Methylmalonate – Plasma/serum
<input type="checkbox"/> Amino acids – Plasma/serum	<input type="checkbox"/> DNA	<input type="checkbox"/> Methylmalonate – Urine
<input type="checkbox"/> Amino acids – Urine	<input type="checkbox"/> Electrolytes	<input type="checkbox"/> Organic acids – Urine
<input type="checkbox"/> Ammonia	<input type="checkbox"/> Enzyme analysis	<input type="checkbox"/> Organic acids – Plasma/serum
<input type="checkbox"/> B vitamins	<input type="checkbox"/> Gal-1-P	<input type="checkbox"/> Phenylalanine
<input type="checkbox"/> Bioppterin – Plasma/serum	<input type="checkbox"/> Glucose	<input type="checkbox"/> Pyruvate
<input type="checkbox"/> Bioppterin – Urine	<input type="checkbox"/> Homocysteine – Plasma/serum	<input type="checkbox"/> Tissue assay/fibroblast/lymphocyte
<input type="checkbox"/> Biotinidase Assay – Serum	<input type="checkbox"/> Ketones – Urine	<input type="checkbox"/> Transferase electrophoresis
<input type="checkbox"/> Blood gas	<input type="checkbox"/> Lactate	<input type="checkbox"/> Tyrosine

5. **Provider(s)** grid displays types of specialists that provide patient services. Identify the providers for this case by checking the checkbox next to the provider's record in the **Check All That Apply** column.
6. **Service(s) Provided** grid displays types of services that are available to a patient. Identify requested services by checking the checkboxes next to the Service(s) provided in the **Check All That Apply** column.
7. **Tests/Procedures Ordered** section displays types of tests that may be ordered for a patient. Identify the tests or procedures for this case by checking the checkbox next to the name of the test or procedure.

Metabolic Services Reporting Form (continued)

FIGURE 4

lgaffney::001
02/26/2007
15:48:20.420

Treatment Initiated or Changed 8

Check All That Apply	Treatment	Date
<input type="checkbox"/>	Referral to Other Specialist	<input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/>
<input type="checkbox"/>	Medications/prescription drugs	<input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/>
<input type="checkbox"/>	Medical Food Supplements/Special Formula	<input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/>
<input type="checkbox"/>	Vitamins	<input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/>
<input type="checkbox"/>	Dietary Restrictions	<input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/>
<input type="checkbox"/>	Other <input style="width: 100px;" type="text"/>	<input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/>

*Global Health Assessment 9

***Health Status/Problems** 10

☒ **Asymptomatic**

Growth and Appearance

☐ Poor feeding

☐ Poor weight gain

☐ Poor muscle tone/hypotonic

☐ Irritability

☐ Lethargy

☐ Vomiting

☐ Dehydration

☐ Diarrhea

☐ Skin abnormalities/rash

☐ Candidiasis

☐ Alopecia

Clinical Findings

☐ Renal disease

☐ Liver disease

☐ Ocular disease

☐ Respiratory disease

☐ Hypoglycemia

☐ Seizures

☐ Ketosis

☐ Spasticity

☐ Ataxia

☐ Hearing Loss

Developmental Status

☐ Mild developmental delay

☐ Moderate developmental delay

☐ Severe developmental delay

Patient Care and Management

☐ Feeding tube required

☐ Frequent hospitalizations to manage disorder

☐ Skilled nursing care required at home

Other significant health problems

☐ Specify, if other (1):

☐ Specify, if other (2):

Check if patient died: ☐ 11

Date of death: --

Was death related to a complication of the metabolic disorder? 12

Cause of death:

12

8. **Treatment Initiated or Changed:** Displays types of treatments that may be prescribed for a patient. Identify the treatment(s) for this case by checking the checkbox next to the treatment name in the **Check All That Apply** column. Enter the date each prescribed treatment was initiated or changed in the **Date** column.
9. **Global Health Assessment:** Select from the dropdown box.
10. **Health Status/Problems:** Displays all the potential health problems or clinical findings for a patient. If the **Asymptomatic** box is checked, the other checkboxes listed will become disabled. If patient is symptomatic, check each box that applies.
11. Check this box if patient died and enter date of death using calendar icon provided. Use dropdown box to indicate whether death was due to a metabolic disorder and enter the cause of death description in the box provided.
12. Click **Cancel** to return to the original history grid.

Modify Adequacy Status (NBS)

Data Intake >> Case Summary (NBS) >> Adequacy Status (NBS)

This screen allows the user to view and modify the Adequacy Status for a certain test. The user can change the Adequacy Status whenever the test results are incomplete and need to be re-sent from the lab.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (NBS) >> Adequacy Status (NBS)

Client Information

Client Name: LastName, FirstName Date of Birth: 01/01/1900

Accession Number: 000-01-022/21-1900-00

Form Number: 2217024771

Test Name: TRA

Adequacy Status: Adequate Specimen

Test Adequacy

Select:	Test Type	Adequacy Status
<input type="radio"/>	CAH Tier Two	
<input type="radio"/>	CFTR DNA Sequencing	
<input type="radio"/>	CFTR Mutation Panel	
<input type="radio"/>	Biotinidase	Adequate Specimen
<input type="radio"/>	CAH Tier One	Adequate Specimen
<input type="radio"/>	HEMOGLOBIN	Adequate Specimen
<input type="radio"/>	Immuno Reactive Trypsinogen	Adequate Specimen
<input type="radio"/>	MSMS	Adequate Specimen
<input checked="" type="radio"/>	TRA	Adequate Specimen
<input type="radio"/>	TSH	Adequate Specimen

Buttons: Save, Cancel, Modify

1. **Client Information** is displayed in read-only format, based on the information from the Case Summary (NBS) screen.
2. This section contains test information for a selected test result.
3. To change the **Adequacy Status** click the radio button next to a row in the **Test Adequacy** grid and click the **Modify** button. Then select the appropriate **Adequacy Status**.
4. **Buttons:**
 - a. **Save:** Saves changes to **Adequacy Status**.
 - b. **Cancel:** Cancels the operation.

Modify Adequacy Status (PNS)

Data Intake >> Case Summary (PNS) >> Adequacy Status (PNS)

This screen allows the user to view and modify the Adequacy Status for a certain analyte. The user will modify the Adequacy Status whenever the test results are incomplete and need to be re-sent from the lab.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (PNS) >> Adequacy Status (PNS)

Update Case (PNS) Adequacy Status (PNS) Case Notes Link Accn Numbers Re-assign CCC
Tracking Events Appointments Services History Enter PSR Link Client to Entity

Client Name: SORIANO, MAYRA Date of Birth: 1/15/1959
Accession Number: 307-16-623/P -2006-32

Patient Information

Form Number:
Test Name:
Run Date:
Run Number:
Adequacy Code:
Value:

Test Values

Select:	Run Date	Test	Adequacy Status	Values	Run Number
<input type="radio"/>	11/03/2006	AFP	A	40.2900 ng/ml	01
<input type="radio"/>	11/03/2006	HCG	A	3.1600 IU/ml	01
<input type="radio"/>	11/03/2006	UE3	A	10.0900 ng/ml	01
<input type="radio"/>	11/03/2006	INH	A	200.4800 pg/ml	01

helpdeskuser:001
03/12/2007
19:16:59.340

1. Basic client information and the case accession number is displayed in a read-only format, based on the information from the Case Summary (PNS) screen.
2. **Patient Information:** Select an Adequacy Code from the dropdown box.
3. **Test Values:** Make a selection by clicking on a radio button and then clicking the **Modify** button.

MS/MS Test Results

Data Intake >> Case Summary (NBS) >> MS/MS Test Results

This screen displays the MS/MS Test Results for a newborn screening case. This screen is invoked from the Case Summary (NBS) screen only when MS/MS Results have been received for the client.

FIGURE 1

GDB-SIS

Data Intake >> Case Summary (NBS) >> MS/MS Test Results

Client Name: JAMESON Date of Birth: 9/21/2006
 Accession Number: 274-19-220/21-2006-22

MS/MS Panel Results: Negative

Panel	Date	Positive Disorder Patterns Flagged	Interpretation
Acylcarnitine	04/05/2007		Negative
Amino Acid	04/05/2007		Negative

MS/MS Analyte Results

Acylcarnitine Panel

Acylcarnitine	Reference Range	Result	Flag
FC	12 - 220 µmol/L	60.7 µmol/L	Normal
FC / (C16 + C18:1) Ratio	0 - 100	6.53	Normal
C-2	5 - 85 µmol/L	50.1 µmol/L	Normal
C-3	0 - 6.5 µmol/L	3.1 µmol/L	Normal
C03 / C02 Ratio	0 - 0.25	0.06	Normal
C-3DC	0 - 0.3 µmol/L	0.180 µmol/L	Normal
C-4	0 - 1.8 µmol/L	0.350 µmol/L	Normal
C-4DC	0 - 2.6 µmol/L	0.970 µmol/L	Normal
C-5	0 - 1.2 µmol/L	0.310 µmol/L	Normal
C-5:1	0 - 0.4 µmol/L	0.070 µmol/L	Normal
C-5OH	0 - 1.2 µmol/L	0.270 µmol/L	Normal

1. Displays client and case information in read-only format.
2. **MS/MS Panel Results:** This grid lists the MS/MS Panel results received on the case.
3. **MS/MS Analyte Results:** This grid lists the MS/MS analyte results received on the case.
4. **Acylcarnitine Panel:** This grid lists the results of the analytes present in the Acylcarnitine Panel, including reference ranges, actual tests results, and analysis.

MS/MS Test Results (continued)

FIGURE 2

5

Back

Amino Acid Panel

Amino Acid	Reference Range	Result	Flag
Glycine	None	548 µmol/L	
Alanine	0 - 900 µmol/L	348 µmol/L	Normal
Valine	None	135.3 µmol/L	
Leucine/Isoleucine	0 - 200 µmol/L	83.7 µmol/L	Normal
Leucine/Alanine Ratio	0 - 1.5	0.24	Normal
Phenylalanine	0 - 140 µmol/L	140.9 µmol/L	High
Phenylalanine/Tyrosine Ratio	0 - 2.3	2.33	High
Tyrosine	0 - 700 µmol/L	60.6 µmol/L	Normal
Methionine	0 - 100 µmol/L	27 µmol/L	Normal
Citrulline	0 - 90 µmol/L	14 µmol/L	Normal
Citrulline/Arginine Ratio	None	1.83	
Ornithine	0 - 450 µmol/L	74 µmol/L	Normal
Ornithine/Citrulline Ratio	None	5.43	
Arginine	0 - 200 µmol/L	7 µmol/L	Normal
Arginine/Ornithine Ratio	None	0.10	
Proline	0 - 1000 µmol/L	149 µmol/L	Normal
5-Oxoproline	None	98 µmol/L	

6

Back

msc.:001
03/23/2007
14:25:58.720

5. **Amino Acid Panel:** This grid lists the results of the analytes present in the Amino Acid Panel, including reference ranges, actual test results, and analysis.
6. **Buttons:**
 - a. **Back:** Navigates the user back to the Case Summary (NBS) screen populated for the case that appears in the header.

NBS MR (Missing Result)

Monitor >> NBS MR

This screen is used to record newborn screening missing results. This form will normally be entered into SIS using Optical Character Recognition (OCR). If the form cannot be OCR'd because it is torn or for some other reason, you may enter the data directly into SIS.

FIGURE 1

GDB-SIS

Data Intake Entity **Monitor** Follow Up Center CCC Utilities

Monitor >> NBS MR

* Hospital/Provider's Code: 47 Search
 Hospital Name: ALAMEDA, COUNTY MEI
 Contact Person Last Name: 1 OREZ
 Telephone: 916-242-6453 Ext.:
 Date Mailed/Faxed: 01-18-2003

Please add newborn details below

* Newborn Last Name: 2 BRONZE
 Sex: Male
 Date of Birth: 01-06-2003
 NBS I-Form: 176598456
 Mother's Last Name: BRONZE
 Mother's First Name: AMY

Add Update Edit

Newborn's Last Name	Sex M/F	Date of Birth (mm/dd/yyyy)	NBS-I Form Number	Mother's Name (Last,First)
BRONZE	M	1/5/2003 12:00:00 AM		BRONZE, AMY

Update Inactivate Cancel

Document Identifier Document Type Scanned Date

4092::msc
01/18/2003
00:00:00.000

1. Hospital/Provider information – **Hospital/Provider Code** is required. The **Search** link may be used to locate a Hospital's Provider Code, and populate the **Hospital/Provider's Code** and **Hospital Name** fields.
2. Newborn information – **Newborn Last Name** is a required field.

NBS MR (Missing Result) (continued)

FIGURE 2

Monitor >> NBS MR

* Hospital/Provider's Code: [Search](#)

Hospital Name:

Contact Person Last Name:

Telephone: - - Ext. :

Date Mailed/Faxed: - -

Please add newborn details below

* Newborn Last Name:

Sex:

Date of Birth: - -

NBS I-Form:

Mother's Last Name:

Mother's First Name:

Newborn's Last Name	Sex M/F	Date of Birth (mm/dd/yyyy)	NBS-I Form Number	Mother's Name (Last,First)
BRONZE	M	1/5/2003 12:00:00 AM		BRONZE, AMY

Document Identifier **Document Type** **Scanned Date**

4092::msc
01/18/2003
00:00:00.000

3. Buttons:

- Add** – Adds information entered in the Newborn details fields to the grid below.
 - Update** – Updates MR forms selected from the grid.
 - Edit** – Allows editing of a selected MR form.
4. Missing test information. This screen is used to enter provider requests for missing newborn screening test results. Requests will be added to the grid allowing multiple entries. SIS will attempt to find a match to existing test results. If a match is found, SIS will automatically mail the results to the requesting hospital.

NBS MR (Missing Result) (continued)

FIGURE 3

GDB-SIS

Monitor >> NBS MR

* Hospital/Provider's Code: [Search](#)

Hospital Name:

Contact Person Last Name:

Telephone: -- Ext. :

Date Mailed/Faxed: --

Please add newborn details below

* Newborn Last Name:

Sex:

Date of Birth: --

NBS I-Form:

Mother's Last Name:

Mother's First Name:

Newborn's Last Name	Sex M/F	Date of Birth (mm/dd/yyyy)	NBS-I Form Number	Mother's Name (Last,First)
C BRONZE	M	1/5/2003 12:00:00 AM		BRONZE, AMY

Document Identifier **Document Type** **Scanned Date**

5. Buttons:

- Update** – Allows you to update an MR entry by clicking the radio button next to a row in the grid and then clicking the **Update** button.
- Inactivate** – May be used by CCC to inactivate the request when the request cannot be matched with test results.
- Cancel** – Clears all fields except the Hospital/Provider Code above, allowing another MR to be entered for the same Hospital/Provider.

6. Links to any scanned documents will be displayed in this grid.

NBS NO (Specimen Not Obtained)

Monitor >> NBS NO

This screen is used to enter information about a newborn whose NBS specimen was not obtained. The newborn details and discharge information are captured on a paper form and submitted to GDB by a hospital. This form will normally be entered using Optical Character Recognition. If the form cannot be OCR'd because it is torn or for some other reason you may enter the data directly into SIS.

After entry of the NBS-NO form, a batch program will run and automatically attempt to match the form with other NBS forms and specimens. If matching is successful, the form will be removed from the manual match queue (see the Potential Match screen).

FIGURE 1

The screenshot shows the 'Monitor >> NBS NO' screen in the GDB-SIS application. The left sidebar contains a navigation menu with options like 'Special Pay Auth', 'Schedule Site Visit', 'Outcome Survey', 'Upload Outcome Survey', 'Search HIPAA', 'Supply Search', 'NBS NO', 'Search NBS Form', 'NBS MR', 'NBS OH', 'NBS TR', 'Search for Tests', 'Review Coord Assign', 'Search Qtrly Report', 'View Alerts', 'PSR Inconsistencies', 'Case Audit Results', 'SCCC', 'Services History', 'Code Karyotypes', 'Case Audit Results MC', 'Resolve Potential Matches', and 'Matches'. The main content area has a header 'Monitor >> NBS NO' and a navigation bar with tabs: 'Data Intake', 'Entity', 'Monitor', 'Follow Up Center', 'CCC', and 'Utilities'. The form fields are as follows:

- Form Date:** A date field with a calendar icon, highlighted by callout 1. The value is 01-18-2003.
- Hospital Details:**
 - *Hospital Code:** A text field with the value 147, highlighted by callout 2. A 'Search' button is next to it.
 - Hospital Name:** A text field with the value Alta, Bates Kaiser.
- Client Newborn's Physician Details:**
 - *Last Name:** A text field with the value Foster, highlighted by callout 3.
 - First Name:** A text field with the value Linda.
 - Address (Number, Street):** A text field with the value 243 Low St.
 - Address (Apt / Suite #):** A text field.
 - City:** A text field with the value Sacramento.
 - State:** A dropdown menu with the value California.
 - Zip:** A text field with the value 91655.
 - Do not validate address:** A checkbox, highlighted by callout 4, which is currently checked.
 - Telephone Number:** A text field with the value 916-575-3452.

1. **Form Date** – This is the date recorded by the hospital on the paper form. You may enter the date or select it from the calendar dropdown.
2. **Hospital Details** – **Hospital Code** is a required field. You may enter the code directly and use the Search function to find the Hospital Name. From the search screen, you must select the hospital and click the Return Selected button to populate the Hospital Name field.
3. **Client Newborn's Physician Details** – **Last Name** is a required field.
Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
4. **Do not validate address** – Checking the box will deactivate the address validation feature.

NBS NO (Specimen Not Obtained) (continued)

FIGURE 2

The screenshot shows a web form titled "Newborn's Details". On the left is a blue sidebar with a mouse cursor. The form fields are as follows:

- *Last Name: Jones
- First Name: John
- Sex: Male
- Multiple Births: Select
- Address (Number , Street): 325 Johnstown Rd.
- Address (Apt / Suite #):
- City: Sacramento
- State: California
- Zip: 91655
- ☒ Do not validate address
- Medical Record Number: 25818965
- Birth Weight (grams): 3000
- Birth Date (mm/dd/yyyy): 01 - 01 - 2003
- Birth Hour (24 hr clock): 0100
- Mother's Last Name: Jones
- Mother's First Name: Mary
- Mother's Birth Date (mm/dd/yyyy): 01 - 01 - 1985
- Mother's Telephone Number: 916 - 352 - 8765 Ext. :
- Other Telephone Number For Family: - - - - - Ext. :
- Date of transfer/discharge: 01 - 01 - 2003

A callout circle with the number "5" points to the "*Last Name" field.

5. Newborn's Details – **Last Name** is a required field.

Note: While mother's Last Name is an optional field on this screen, when you attempt to search for a form record, the Newborn's Last Name or Mother's Last Name a required field. As such, entry of the mother's Last Name information on this screen will be helpful for future searches.

NBS NO (Specimen Not Obtained) (continued)

FIGURE 3

The above new born was discharged/transferred without a newborn screening specimen taken because (check one):

☐ Expired

☒ Parents refused to have specimen collected. Fill out NBS-TR (Screening Test Refusal). Send a copy of the signed test refusal to the Newborn Screening Section

☐ Transferred to the following receiving hospital or on before six days of age

6 Hospital Name, if baby is transferred

City

☐ Other reason

Reason (If other has been selected)

7

8

Document Identifier	Document Type	Scanned Date
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6. Reason why specimen was not obtained, and other details.

7. **Buttons:**

- Save** – Saves the entered information.
- Cancel** – Clears all unsaved data and reloads the screen.
- Inactivate** – Inactivates the record. SIS will not attempt matching, but the record is not deleted.

8. Once an NBS-NO form has been scanned, it will be stored in SIS, and accessible for viewing in this scanned documents grid. A hyperlink in the grid will allow you to access the image for viewing.

NBS OH (Out of Hospital)

Monitor >> NBS OH

This screen is used to enter information for a birth that occurred outside of a licensed healthcare facility. This form will normally be entered into SIS using Optical Character Recognition (OCR). If the form cannot be OCR'd because it is torn or for some other reason, you may enter the data directly into SIS.

FIGURE 1

GDB-SIS

Navigation: Data Intake | Entity | **Monitor** | Follow Up Center | CCC | Utilities

Monitor >> NBS OH

Special Pay Auth
Schedule Site Visit
Outcome Survey
Upload Outcome Survey
Search HIPAA
Supply Search
NBS NO
Search NBS Form
NBS MR
NBS OH
NBS TR
Search for Tests
Review Coord Assign
Search Qtrly Report
View Alerts
PSR Inconsistencies
Case Audit Results
STCC
Services History
Code Karyotypes
Case Audit Results MC
Resolve Potential Matches

4092::msc
01/18/2003
00:00:00.000

Birth Registration Information:

Date of Birth Registration: 01-18-2003

County: Alameda

Other Registrar Jurisdiction:

* Newborn's Last Name: WONG

First Name: NANCY

* Sex: Female

Mother's Last Name: WONG

Mother's First Name: SALLY

Address (Number, Street): 427 Smith St.

Address (Apt / Suite #):

City: Oakland

State: California

Zip: 91567

☐ Do not validate address

Birth Date (month, day, year): 01-17-2003

Birth Hour (24hr clock): 0200

Birth Weight (grams): 3000

Parent Phone (including area code): 916-353-7777 Ext. :

Has a newborn screening test been done: Yes

If Yes, where was the test done:

Screening Information:

Date of Test: 01-18-2003

Newborn's primary care provider Last name: BOND

Newborn's primary care provider First name: JULES

Address (Number, Street): 425 Tixel Rd

Address (Apt / Suite #):

City: Oakland

State: California

Zip: 91623

☒ Do not validate address

Phone Number of the Primary care provider: 915-241-7865 Ext. :

Screening Status (If no screening):
Check the appropriate boxes

☐ Infant Expired
☐ Parent's refused newborn screening test
☐ Refusal form signed

Comments:

Save | Cancel | Inactivate

Document Identifier | Document Type | Scanned Date

1. Birth registration information. SIS will attempt to match this information with other NBS forms in SIS. If potential matches are found (SIS did not make a definitive match), they will be displayed on the Resolve Potential Matches screen for resolution by the GDB Monitor.

NBS OH (Out of Hospital) (continued)

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Special Pay Auth
Schedule Site Visit
Outcome Survey
Upload Outcome Survey
Search HIPAA
Supply Search
NBS NO
Search NBS Form
NBS MR
NBS OH
NBS TR
Search for Tests
Review Coord Assign
Search Qtrly Report
View Alerts
PSR Inconsistencies
Case Audit Results
SCCE
Services History
Code Karyotypes
Case Audit Results MC
Resolve Potential Matches

Monitor » NBS OH

Date of Birth Registration: 01-18-2003
County: Alameda
Other Registrar Jurisdiction:
*Newborn's Last Name: WONG
First Name: NANCY
*Sex: Female
Mother's Last Name: WONG
Mother's First Name: SALLY
Address (Number, Street): 427 Smith St.
City: Oakland
State: California
Zip: 91567
☐ Do not validate address
Birth Date (month,day,year): 01-17-2003
Birth Hour (24hr clock): 0200
Birth Weight (grams): 3000
Parent Phone (including area code): 916-353-7777 Ext.:
Has a newborn screening test been done? Yes
If Yes, where was the test done:
Date of Test: 01-18-2003
Newborn's primary care provider Last name: BOND
Newborn's primary care provider First name: JULES
Address (Number, Street): 425 Trexel Rd
Address (Apt / Suite #):
City: Oakland
State: California
Zip: 91623
☒ Do not validate address
Phone Number of the Primary care provider: 915-241-7865 Ext.:
Screening Status (If no screening):
Check the appropriate boxes
☐ Infant Expired
☐ Parent's refused newborn screening test
☐ Refusal form signed
Comments:
4092::msc
01/18/2003
00:00:00.000

2

3

4

Save Cancel Inactivate

Document Identifier Document Type Scanned Date

2. Newborn and provider information. **Newborn's Last Name** and **Sex** are required fields.
3. Buttons:
 - a. **Save** – Saves the entered information.
 - b. **Cancel** – Clears all fields.
 - c. **Inactivate** – The CCC may inactivate matching processes for this record.
4. Links to any scanned documents will be displayed in this grid.

NBS TR (Test Refused)

Monitor >> NBS TR

This screen is used to record newborn screening test refusals. This form will normally be entered into SIS using Optical Character Recognition (OCR). If the form cannot be OCR'd because it is torn or for some other reason, you may enter the data directly into SIS on this screen.

SIS will not attempt to match this form to case records in SIS, such as case and client information, but will attempt to match this form with existing NBS–NO, NBS–OH and NBS–MR forms.

NBS TR (Test Refused) (continued)

GDB-SIS

Home ? Help ! Logout

Data Intake Entity Monitor Follow Up Center CCC Utilities

Monitor >> NBS TR

Special Pay Auth
Schedule Site Visit
Outcome Survey
Upload Outcome Survey
Search HIPAA
Supply Search
NBS NO
Search NBS Form
NBS MR
NBS OH
NBS TR
Search for Tests
Review Coord Assign
Search Qtrly Report
View Alerts
PSR Inconsistencies
Case Audit Results
SCCC
Services History
Code Karyotypes
Case Audit Results MC
Resolve Potential Matches

3589::msc
01/06/2005
08:06:24.280

1 Newborn Last Name: Jones
Newborn First Name: Sarah
Birth Date: 01 - 05 - 2005
Sex: Female
Address (Number , Street): 987 High St.
Address (Apt / Suite #):
City: Sacramento
State: California
Zip: 91654 -
☒ Do not validate address
Was this a Home Birth: ☒
Hospital of birth:
Medical Record Number: 54674889
Date of signing the Test Refusal (TR) form: 01 - 05 - 2005
Signee Last Name: Jones
Signee First Name: Mary
Relationship to Newborn: Mother
Date of signing the Test Refusal (TR) form (Witness): 01 - 05 - 2005
Witness Last Name: Smith
Witness First Name: Charles
Comments:

2 **3** Save Cancel Inactivate

4 Document Identifier Document Type Scanned Date

1. Newborn information. **Newborn Last Name** and **Sex** are required fields.
2. Test refusal information.
3. **Buttons:**
 - a. **Save** – Saves the entered information.
 - b. **Cancel** – Clears all fields, discarding any unsaved data.
 - c. **Inactivate** – Inactivates the record and stops the matching processes for a form that has been entered into SIS.
4. Links to any scanned documents will be displayed in this grid.

Outcome Survey

Monitor >> Outcome Survey

This screen allows you to search, view, and edit existing Outcome Surveys associated with a PNS accession number. The search results grid displays the basic outcome survey data. The Linked NBS Case grid displays any NBS cases linked to the pregnancy. This allows you to compare the outcome surveys to the NBS TRF information, and identify any discrepancies.

Outcome Survey (continued)

FIGURE 1

Monitor >> Outcome Survey

* Accession # Go Search Cancel

Search Results

Select	Survey Id	Fetus	Date Pregnancy Ended	Status	Last Mailer Date	OCR Image	Status
<input type="radio"/>	200611824	1	05/08/2008	Active			Complete

Edit Cancel Suppress Followups and Mailers

Linked NBS Case

1. **Accession Number** is a required field. You must enter an accession number to search for an existing outcome survey. If there are no outcome surveys associated with an accession number, SIS will return an error to notify you that no outcome survey records were found for the accession number.
2. **Go** link directs you to the **Client/Case Search** screen, which allows you to search for and return an **Accession Number**.
3. **Buttons:**
 - a. **Search** button initiates a search for outcome surveys for the entered accession number.
 - b. **Cancel** button cancels the search query and directs you to the View Alerts screen.
4. Outcome survey records will be displayed in the **Search Results** grid, with the basic outcome survey data, and a link to the scanned paper form in the OCR Image column. To edit or view an outcome survey, select the survey using the radio button in the Select column, and click the **Edit** button.
5. **Buttons:**
 - a. **Edit** button allows you to view, enter, and modify a selected outcome survey.
 - b. **Suppress Followups and Mailers** stops the automatic SIS process for outcome surveys. No further mailers will be sent, and the case will not be referred to CCC #59. To suppress follow-ups and mailers for an outcome survey, click the **Suppress Followups and Mailers** button.
6. **Linked NBS Case** grid displays any NBS cases that are linked to a pregnancy. Basic TRF information will be displayed.

Outcome Survey (continued)

FIGURE 2

7 Enter or Modify Outcome Survey

<p>Patient Information CHOPRA, RIYA 9031 Capitol Ave Fontana, California 92335-4683</p> <p>Medical Record Number: Blood Collection Date: Accession Number: SSN #: Birth Date: Survey Id:</p> <p>Is Survey Active <input checked="" type="checkbox"/></p> <p>Last Name of Person Completing the Form: <input type="text"/></p> <p>First Name of Person Completing the Form: <input type="text"/></p> <p>Date form completed: 09 - 10 - 2008 <input type="button" value="Calendar"/></p> <p>Number of Fetuses: 1 <input type="button" value="Dropdown"/></p> <p>Date Pregnancy Ended: 05 - 08 - 2008 <input type="button" value="Calendar"/></p>	<p>Provider Information FOLEY, JILL 16127 Foothill Blvd Suit 10 Fontana, California 92335-3374</p> <p>08/23/2008 236-47-132/A -2008-11 578-68-1628 11/17/1960 200611824</p>
---	---

8

9

10

Select Infant/Fetus	Sex	BirthWeight	Pregnancy Outcome	Abnormality
<input type="radio"/> A	Male	3265	Unknown/Last to follow-up	Unknown

11

7. The **Enter or Modify Outcome Survey** section is only displayed after you click the **Edit** button above (see #5).
8. The **Patient Information** and **Provider Information** are displayed in a read-only format, based on the existing case information of the client.
9. Checking the **Is Survey Active** checkbox allows the selected outcome survey's data to become available for the registry. Check this box when the selected outcome survey is complete, or to indicate that the selected outcome survey is active among multiple outcome surveys linked to accession number currently used.
10. The Infant/Fetus grid is displayed grid when the Number of Fetuses field is one or more. Use the radio button to select which Infant/Fetus information to edit.
11. **Buttons:**
 - a. For the selected Infant/Fetus, the **Edit** button displays the Infant/Fetus fields for editing (See Figure 3)
 - b. **Cancel** button clears any changes made to the Infant/Fetus fields. The screen will scroll to the **Enter or Modify Outcome Survey** section.

Outcome Survey (continued)

FIGURE 3

msc::001
09/10/2008
11:40:37.730

Fetus Letter:

Pregnancy Outcome:

Fetus / Infant Sex:

If Live Birth, Infant's Birth-Weight: grams lbs

Did the Fetus/Infant from this pregnancy have any significant physical abnormalities?

13 Add To Grid

14 Search for Provider

Alternate Provider Information:

Name of Alternate Provider:

Facility:

Address (Number , Street):

Address (Apt / Suite #):

City:

State:

Zip: -

15

16 ☐ Do not validate address

Comments:

Generate Print Save Cancel

12. Once you select an Infant/Fetus and click the Edit button (see 13 above), the Infant/Fetus information fields are displayed for editing.
13. **Add to Grid** button saves the data from the Infant/Fetus fields, and displays the updated information in the **Infant/Fetus** grid.
14. You must click the **Search for Provider** link to obtain the **Alternate Provider Information** from the Search Entity screen.
15. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
16. **Do not validate address** – Checking the box will deactivate the address validation feature.

Outcome Survey (continued)

FIGURE 4

msc::001
09/10/2008
11:40:37.730

Fetus Letter:

Pregnancy Outcome:

Fetus / Infant Sex:

If Live Birth, Infant's Birth-Weight: grams
 lbs oz

Did the Fetus/Infant from this pregnancy have any significant physical abnormalities?

Alternate Provider Information:

Name of Alternate Provider:

Facility:

Address (Number , Street):

Address (Apt / Suite #):

City:

State:

Zip: -

☐ Do not validate address

Comments:

17

17. Buttons:

- Generate** button will send a new survey to the provider. If no outcome survey data has been entered from a previous outcome survey, a new survey will be sent to the alternate provider. The **Generate** button will become available after you have entered the provider information.
- Print** button allows you to print the outcome survey with the current survey data, to mail this information to the provider. When the printed outcome survey is returned completed, you will not be able to scan it, as it will be in a different format than the original. Therefore, you will need to enter the data into SIS. The **Print** button will become available after you have entered the provider information.
- Save** button will save the outcome survey data you have entered or changed.
- Cancel** button cancels any unsaved changes made to the outcome survey, and reloads the screen.

Page Security

Utilities >> View Security Groups >> Page Security

The **Page Security** screen is used to modify the Read, Create, Update and Delete permission(s) that each security group has for every screen in SIS. Following is a description of each permission available in SIS:

- **Create** – The user is allowed to create a new entry in SIS.
- **Read** – The user is allowed to view the information on the screen.
- **Update** – The user is allowed to update existing information in SIS.
- **Delete** – The user is allowed to delete an existing entry in SIS.

To access the Page Security screen select a security group on the View Security Groups screen, and click the Show Access button.

Utilities >> View Security Groups >> Page Security

For security group 1 Coordinator Center - NBS - Administrator/Supervisor

Module	Screen Name	Read	Create	Update	Delete
CCC	CCC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CCC	Headline Cases (NBS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CCC	Headline Cases (PNS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CCC	Set Case Alerts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DATA INTAKE	Addl Test Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATA INTAKE	Adequacy Status (NBS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATA INTAKE	Adequacy Status (PNS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATA INTAKE	Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATA INTAKE	Audit Data Entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save 3 Back

1. The selected security group is displayed in a read-only format.
2. The security grid displays the permission that the selected group has for each screen in SIS. Permissions are displayed for one screen on each row. Place a check mark in the column for the permission you wish to grant for each screen. Click an existing check mark to un-check it and remove the permission.
3. **Buttons:**
 - a. Click the **Save** button to save the permissions you have granted or deleted.
 - b. Click the **Back** button to return to the View Security Groups screen, discarding any unsaved changes.

PNS Interpretation Grid

Utilities >> Maint Business Rules >> PNS Interp Grid

This page maintains PNS variables that control result mailers, case status, and case interpretations. All predefined specimen conditions are listed in the grid. Depending upon your access rights in SIS, you may have the ability to update the interpretation factors, or you may only have the ability to view them.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Utilities >> Maint Business Rules

Version	Program Area	Status
10.0101	NBS	Editable
14.0001	PNS	Editable
9.0101	NBS	Read-Only
8.0101	NBS	Read-Only
7.0101	NBS	Read-Only
6.0101	NBS	Read-Only
3.0101	NBS	Read-Only
2.0101	NBS	Read-Only
1.0101	NBS	Read-Only
14.0000	PNS	Read-Only
13.0101	BNS	Read-Only

View Interpretation Grid View PNS Mailer Grid

View Maintain Mailer Text View Interpretation Parameters

msc::001
12/31/2008
00:00:00.000

1. Select the **Version No.** from the grid only the newest versions will be editable. All previous versions will be read-only. Click on **View Interp Grid** button displays the Search page for PNS Interp grid.

PNS Interpretation Grid (continued)

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Utilities » Maint Business Rules » PNS Interp Grid

View All Users
Batch Run Time Rept
Assign CCC/Lab
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test
Update Tel Area
Batch Interface
Update User Date Time
Maintain Valid PNS Form Number Range
Futerizer

Effective Date: 12/31/2008

Grid Line Description: Select

Trimester/Situation Code: Select

CVS: Select

Fetus Number: Select

NTD: Select

T21: Select

T18: Select

SLO: Select

Search Reset

msc::001
12/31/2008
00:00:00.000

2. **Effective Date** field is for Effective Date is defaulted with the current date. If the Effective Date is a date prior to PE-II go-live date, the trimester / situation code drop down list is disabled and is defaulted to 'Q'. The grid is populated with all gridlines that were active on the Effective Date.
3. Narrow down the Search criteria by selecting any one or more fields from the drop downs or you can directly click on **Search** button which will display all the interp gridlines as Figure 3.

PNS Interpretation Grid (continued)

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center CC

Utilities » Maint Business Rules » PNS Interp Grid

Effective Date: 12/31/2008

Grid Line Description: Select

Trimester/Situation Code: Select

CVS: Select

Fetus Number: Select

NTD: Select

T21: Select

T18: Select

SLO: Select

Search Reset

Grid Line	Grid Line Description	Trimester/Situation Code	CVS #	FET	NTD	T21	T18	SLO	Redraw	Overall Interp Code	Tracking Status Code	Tracking Event Series	Headline Case	Headline Type
<input type="checkbox"/> 0A	1ST TRIMESTER COMBINED RISK SUPERSEDED	F	Z	Z	0	0	0	0		FSUP	CRSKSUP	NO GRP	Y	(H)
<input type="checkbox"/> 0B	1ST TRIMESTER COMBINED RISK REFINED	1	Z	Z	0	0	0	0		FREF	CRSKREF	NO GRP	N	(H)
<input type="checkbox"/> 0C	1ST TRIMESTER SERUM ONLY	N	Z	Z	0	0	0	0		NFAR	AWFURDAT	NO GRP	N	V
<input type="checkbox"/> 0D	1ST TRIMESTER SERUM ONLY	N	N	S	0	0	0	0		NFAR	AWFURDAT	NO GRP	N	V
<input type="checkbox"/> 0E	1ST TRIMESTER SERUM ONLY	N	N	M	0	0	0	0		NFAR	AWFURDAT	NO GRP	A	V

msc::001
12/31/2008
00:00:00.000

Add Update

4. The interpretation factor grid displays the PNS interpretation data.
5. Select one or more interpretation record for editing using the Check box next to the record, and click the Update button to change it.
6. **Buttons:**
 - a. **Update** – Click update the selected interpretation record (see **FIGURE 4**).
 - b. **Add** – Adds a new PNS variable (see **FIGURE 4**).

PNS Interpretation Grid (continued)

FIGURE 4

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Utilities >> Maint Business Rules >> PNS Interp Grid

View All Users
Batch Run Time Rept
Assign CCC/Lab
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test
Update Tel Area
Batch Interface
Update User Date Time
Maintain Valid PNS Form Number Range
Futerizer

Grid Line Sequence No.:

*Selected Grid Lines:

*Grid Line Description:

*Trimester/Situation Code:

CVS:

#FET:

NTD:

T21:

T18:

SLO:

Redraw Type Code:

*Overall Interp Code:

*Tracking Status Code:

*Tracking Event Series:

*Headline Case:

*Headline Type:

☐ Arrange immediate ref. - A ☐ Too Early, high AFP - F ☐ Too Late, high AFP - M

☐ Too Early - E ☐ Too Late - L ☐ HX/RX - (H)

☐ Twins - T ☐ Confirm preg. status - P ☐ Delayed/Late in transit - D

☐ Ask about redraw - W ☐ Agreed to PDC ref. - R ☐ PDC appt. NOT kept - N

☐ Not Screenable - S ☐ Insuff. patient info - V ☐ Inadequate specimen - I

Hx/Rx:

*Effective Start Date:

Minimum Panel Code	Maximum Panel Code

msc::001
12/31/2008
00:00:00.000

Add Panel Update Panel Delete Panel

Save Cancel

FIGURE 4 appears when you click the Add or Update button. If you click Add, the fields will be blank. If you click Update, the fields will be populated with the data from the selected record.

7. Enter PNS variable data in the fields provided.
8. The panel grid displays all existing minimum and maximum panel codes associated with the PNS variable you are editing. When adding a new PNS variable, this grid will be blank.
9. **Buttons:**
 - a. **Update Panel** – Click after selecting a radio button next to a record in the panel grid to edit (see **FIGURE 4**).
 - b. **Add Panel** – Add new panel codes. The add panel fields will then be displayed (see **FIGURE 4**).
 - c. **Delete Panel** – Deletes the selected record from the panel grid.

PNS Interpretation Grid (continued)

10. Buttons:

- a. **Save** – Save the changes to the PNS variable data.
- b. **Cancel** – Cancel current action without saving and revert to PNS Interpretation Grid view displayed in **FIGURE 3**.

FIGURE 5

*Minimum Panel Code:

*Maximum Panel Code:

Minimum Panel Code **Maximum Panel Code**

Minimum Panel Code	Maximum Panel Code

11. Enter the minimum and maximum panel values in the **Minimum Panel Code** and **Maximum Panel Code** fields. Both fields are required to add or update a panel record.

12. Buttons:

- a. **Save Panel** – Saves the panel codes. A row will be added/updated to the panel grid.
- b. **Cancel Panel** – Cancel the update action and revert to the PNS interpretation grid view displayed in **FIGURE 2** without saving.

PNS Interpretation Grid (continued)

FIGURE 6

FIGURE 6 appears when user clicks the Update button after selecting multiple grid lines from previous screen (**Figure-3**). This screen will be used to save Interp Grid details for multiple grid lines.

13. **Selected Grid Lines** is a read-only field and will display all the grid lines selected in previous screen. Enter Interp Grid details common for selected grid lines.

14. **Buttons:**

- c. **Save** – Save the changes to the PNS variable data.
- d. **Cancel** – Cancel current action without saving and revert to PNS Interpretation Grid view displayed in **FIGURE 3**.

PNS Mailer Grid

Utilities >> Maint Business Rules >> PNS Mailer Grid

This screen allows you to maintain and update the variables that control the structure of result mailers. The mailers are tied to a PNS interpretation version. Only the mailers associated with the newest interpretation versions will be editable. All previous versions will be read only.

GDB-SIS

Utilities >> Maint Business Rules

	Version	Program Area	Status
<input type="radio"/>	10.0101	NBS	Editable
<input checked="" type="radio"/>	13.1001	PNS	Editable
<input type="radio"/>	9.0101	NBS	Read-Only
<input type="radio"/>	8.0101	NBS	Read-Only
<input type="radio"/>	7.0101	NBS	Read-Only
<input type="radio"/>	6.0101	NBS	Read-Only
<input type="radio"/>	5.0101	NBS	Read-Only
<input type="radio"/>	4.0101	NBS	Read-Only
<input type="radio"/>	3.0101	NBS	Read-Only
<input type="radio"/>	2.0101	NBS	Read-Only
<input type="radio"/>	1.0101	NBS	Read-Only

View Interpretation Grid View PNS Mailer Grid

View Maintain Mailer Text View Interpretation Parameters

msc::001
08/01/2008
00:01:00.000

Figure 1 - Maintain Business Rules screen

1. Select the mailer grid version you would like to view/edit by selecting the **Grid Version** and clicking on “View PNS Mailer Grid” button, on Utilities >> Maint Business Rules screen. Only the mailer grid records associated with the newest interpretation versions will be editable. All previous versions will be read only. The above action results in navigation to Utilities >> PNS Mailer Grid screen.

PNS Mailer Grid (continued)

GDB-SIS

Utilities » Maint Business Rules » PNS Mailer Grid

*Effective Date: 08-01-2008

Grid Line Sequence Number: 5683

Grid Line Number: 10A

Grid Line Description: Select

Trimester/Situation Code: Select

Overall Interp Code: Select

No Result: Select

NTD Risk Code: Select

NTD Risk Rider V01: Select

NTD Risk Rider I01: Select

NTD Risk Rider I02: Select

NTD Risk Rider I03: Select

NTD Risk Rider I04: Select

T21 Risk Code: Select

T21 Rider V02: Select

T21 Rider PD1: Select

T21 Rider PD2: Select

T21 Rider PPL: Select

T21 Rider SMK: Select

T18 Risk Code: Select

SLOS Risk Code: Select

CCC Send Mailer: Select

Elevated hCG: Select

Patient Letter: Select

Reminder Letter: Select

Authorized Action: Select

Authorized Action Rider A01: Select

Authorized Action Rider A02: Select

Authorized Action Rider A03: Select

Authorized Action Rider A04: Select

Authorized Action Rider A05: Select

Authorized Action Rider A06: Select

Authorized Action Rider A07: Select

Authorized Action Rider A08: Select

Integrated Screening Rider IS01: Select

Integrated Screening Rider IS02: Select

Integrated Screening Rider IS03: Select

Integrated Screening Rider IS04: Select

Integrated Screening Rider IS05: Select

Integrated Screening Rider IS06: Select

Integrated Screening Rider IS07: Select

Integrated Screening Rider IS08: Select

Integrated Screening Rider IS09: Select

Integrated Screening Rider IS10: Select

Search Reset

Grid Line Sequence Number	Grid Line Number	Grid Line Description	Trimester/Situation Code	Overall Interp Code	No Result	NTD Risk Code	NTD Risk Rider V01	NTD Risk Rider I01	NTD Risk Rider I02	NTD Risk Rider I03	NTD Risk Rider I04	T21 Risk Code	T21 Rider V02	T21 Rider PD1	T21 Rider PD2
5683	10A	1ST TRIMESTER NO INTERPRETATION POSSIBLE-- FETAL REDUCTION, DEMISE, TRIPLETS	1	NFNS	IFC	ZZZ	N	N	N	N	N	ZZZ	N	N	N

msc: :001
08/01/2008
00:01:00.000

1

Add Update

This grid continues scrolling horizontally to the right.

Figure 2 - PNS Mailer Grid screen

2. You can do a search based on any of the parameters as shown in Figure 2.

3. Buttons :

- Search** – displays all gridlines based on the search criteria.
- Reset** – clears all search criteria entered.
- Add** – allows you to add a new mailer grid line and enter the corresponding variables (See **FIGURE 3**).
- Update** – allows you to view/edit the selected grid line (See **FIGURE 4**). Update button also allows updating multiple gridlines simultaneously (See **Figure 5**)

PNS Mailer Grid (continued)

4. PNS Mailer Grid search results grid displays the mailer grid records based on the search criteria.
5. If “Select All” checkbox is selected, it checks the checkbox in front of all gridlines displayed in the result set. If unselected, clears the checkbox in front of all gridlines displayed in the result set. “Select All” checkbox is selected if you want to update all the gridlines in the search results grid simultaneously.
6. Individual checkboxes can be selected to select that particular row (or a group of rows) for update.

GDB-SIS

Utilities » Maint Business Rules » PNS Mailer Grid

*Grid Line Sequence Number:

*Grid Line:

*Grid Line Desc:

*Trimester/Situation Code:

*Overall Interp Code:

*No Result:

*NTD Risk Code:

NTD Risk Rider V01:

NTD Risk Rider I01:

NTD Risk Rider I02:

NTD Risk Rider I03:

NTD Risk Rider I04:

*T21 Risk Code:

T21 Rider V02:

T21 Rider PD1:

T21 Rider PD2:

T21 Rider PPL:

T21 Rider SMK:

*T18 Risk Code:

*SLOS Risk Code:

*Authorized Action:

Authorized Action Rider A01:

Authorized Action Rider A02:

Authorized Action Rider A03:

Authorized Action Rider A04:

Authorized Action Rider A05:

Authorized Action Rider A06:

Authorized Action Rider A07:

Authorized Action Rider A08:

Integrated Screening Rider IS01:

Integrated Screening Rider IS02:

Integrated Screening Rider IS03:

Integrated Screening Rider IS04:

Integrated Screening Rider IS05:

Integrated Screening Rider IS06:

Integrated Screening Rider IS07:

Integrated Screening Rider IS08:

Integrated Screening Rider IS09:

Integrated Screening Rider IS10:

CCC Send Mailer:

Elevated hCG:

*Patient letter:

Reminder letter:

*Effective Start Date:

Save Cancel

msc: 001
08/01/2008
00:01:00.000

Figure 3 - PNS Mailer Grid - Add Mode

PNS Mailer Grid (continued)

GDB-SIS

Home ? ! X

Data Intake Entity Monitor Follow Up Center CCC Utilities

Utilities » Maint Business Rules » PNS Mailer Grid

View All Users
Batch Run Time Rept
Assign CCC/Lab
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test
Update Tel Area
Batch Interface
Update User Date
Time
Maintain Valid PNS
Form Number Range
Futerizer

*Grid Line Sequence Number: 5683
*Grid Line Number: 10A
*Grid Line Desc: 1ST TRIMESTER NO INTERPRETATION POSSIBLE--FETAL REDUCTION, DEMISE, TRIPL
*Trimester/Situation Code: 1
*Overall Interp Code: NFNS
*No Result: IFC
*NTD Risk Code: ZZZ
NTD Risk Rider V01: N
NTD Risk Rider I01: No
NTD Risk Rider I02: No
NTD Risk Rider I03: No
NTD Risk Rider I04: No
*T21 Risk Code: ZZZ
T21 Rider V02: N
T21 Rider PD1: N
T21 Rider PD2: N
T21 Rider PPL: No
T21 Rider SMK: N
*T18 Risk Code: ZZZ
*SLOS Risk Code: ZZZ
*Authorized Action: NRDR
Authorized Action Rider A01: N
Authorized Action Rider A02: N
Authorized Action Rider A03: Maybe
Authorized Action Rider A04: N
Authorized Action Rider A05: N
Authorized Action Rider A06: N
Authorized Action Rider A07: N
Authorized Action Rider A08: Y
Integrated Screening Rider IS01: No
Integrated Screening Rider IS02: No
Integrated Screening Rider IS03: No
Integrated Screening Rider IS04: No
Integrated Screening Rider IS05: No
Integrated Screening Rider IS06: No
Integrated Screening Rider IS07: No
Integrated Screening Rider IS08: No
Integrated Screening Rider IS09: No
Integrated Screening Rider IS10: No
CCC Send Mailer: N
Elevated hCG: No
*Patient letter: 00
Reminder letter: Select
*Effective Start Date: 12-15-2007
Save Cancel

8

10

mhc::001
08/01/2008
00:01:00.000

Figure 4 - PNS Mailer Grid - Update Mode (Single Row)

PNS Mailer Grid (continued)

GDB-SIS ? ! ☒

Data Intake **Entity** **Monitor** **Follow Up Center** **CCC** **Utilities**

Utilities >> Maint Business Rules >> PNS Mailer Grid

View All Users
Batch Run Time Rept
Assign CCC/Lab
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test
Update Tel Area
Batch Interface
Update User Date
Time
Maintain Valid PNS
Form Number Range
Futerizer

msc::001
08/01/2008
00:01:00.000

*Selected Grid Lines:
47, 47, 47, 47

*No Result:
Select

*NTD Risk Code:
NTD Risk Rider V01:
Select
NTD Risk Rider I01:
Select
NTD Risk Rider I02:
Select
NTD Risk Rider I03:
Select
NTD Risk Rider I04:
Select

*T21 Risk Code:
T21 Rider V02:
Select
T21 Rider PD1:
Select
T21 Rider PD2:
Select
T21 Rider PPL:
Select
T21 Rider SMK:
Select

*T18 Risk Code:
Select

*SLOS Risk Code:
Select

*Authorized Action:
Authorized Action Rider A01:
Select
Authorized Action Rider A02:
Select
Authorized Action Rider A03:
Select
Authorized Action Rider A04:
Select
Authorized Action Rider A05:
Select
Authorized Action Rider A06:
Select
Authorized Action Rider A07:
Select
Authorized Action Rider A08:
Select

Integrated Screening Rider IS01:
Select
Integrated Screening Rider IS02:
Select
Integrated Screening Rider IS03:
Select
Integrated Screening Rider IS04:
Select
Integrated Screening Rider IS05:
Select
Integrated Screening Rider IS06:
Select
Integrated Screening Rider IS07:
Select
Integrated Screening Rider IS08:
Select
Integrated Screening Rider IS09:
Select
Integrated Screening Rider IS10:
Select

CCC Send Mailer:
Select
Elevated hCG:
Select

*Patient letter:
Select

Reminder letter:
Select

*Effective Start Date:
- - -

9

10

Save Cancel

Figure 5 - PNS Mailer Grid - Update Mode (Multiple Rows)

7. The mailer grid fields are displayed for the selected record when you click the **Update** button (when single row is selected). The fields "Gridline Sequence Number", "Gridline Number", "Grid Line Desc", "Trimester/ Situation Code", "Overall Interp Code" are read only.
8. When you click the **Add** button, the above fields will be blank.

PNS Mailer Grid (continued)

9. When you click the **Update** button and when multiple rows are selected, then only the “Selected Grid Lines” field is populated. All other fields are blank.
10. **Buttons:**
 - a. **Save** button, when updating a mailer grid record, saves any changes. When adding a new record, creates a new grid line record. If multiple gridlines are being updated, only those fields where the value entered by the user is not blank or ‘Select’ are updated.
 - b. **Cancel** button cancels any unsaved changes, and the mailer grid is displayed (**see Figure 2**).

PSR Inconsistencies

Monitor >> PSR Inconsistencies

The **PSR Inconsistencies** screen (Figure 1) is used to view inconsistencies for a Patient Services Report (PSR) that has been entered by a Prenatal Diagnosis Center (PDC). When a PSR that has been submitted to SIS contains inconsistencies, an “Alert” message will be generated for the PSQA Monitor, who can view the inconsistencies from this screen. When you first view the inconsistency, it will be marked as unresolved.

Note: The invoice for a PSR will not be processed by GDB until all inconsistencies have been resolved or overridden. If the inconsistencies in the PSR are resolved the inconsistency will automatically be marked as resolved, and will disappear from the inconsistencies grid (see **FIGURE 2**). The PSQA Monitor may also choose to override inconsistencies. After all inconsistencies for a PSR have been resolved or overridden, the invoice processing through the Business Service System (BSS) will begin.

FIGURE 1

1. Navigation and screen name.
2. Information about the specific PSR with inconsistencies is displayed, including the **PDC Code** (read-only), **Accession Number**, and the date and time when the **PSR** was entered (read-only). The **Accession Number** may be copied or pasted using the icon next to the **Accession Number**. If you manually enter (or copy/paste) an Accession Number, click the **Go** button to view the inconsistency grid for the selected Accession Number (Figure 3).
3. The **Text** field displays the red text message for the inconsistency that was displayed (at the top of the screen) at the PDC and was not resolved by the user. Information in the **Text** field will be displayed in a read-only format.
4. The **Resolution** status dropdown is displayed below the PSR information once you have selected an inconsistency from the Inconsistency grid for editing (see #6). The dropdown choices are: “Resolved”, “Unresolved” or “Overridden”.

If you resolve the inconsistencies in the PSR the inconsistency will automatically be marked as resolved, and will disappear from the inconsistencies grid (see **FIGURE 3**).

Note: It is not a recommended practice to manually mark an inconsistency as “Resolved”.

PSR Inconsistencies (continued)

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Monitor >> PSR Inconsistencies

Special Pay Auth
Schedule Site Visit
Outcome Survey
Upload Outcome Survey
Search HIPAA
Supply Search
NBS NO
Search NBS Form
NBS MR
NBS OH
NBS TR

PDC Code 75f

Accession Number 001-31-003/P-2003-31

PSRs 7/5/2004 12:00:00 AM Go

Text Amniocentesis date entered, but Amniocen not indicated. Remove

Resolution Select

5 Save Cancel

5. Buttons:

- Click the **Save** button to save changes to the Resolution of the selected inconsistency.
- Click the **Cancel** button to discard any unsaved changes to the selected inconsistency.

FIGURE 3

Search for Tests
Review Coord Assign
Search Qtrly Report
View Alerts
PSR Inconsistencies
Services History
Code Karyotypes
Resolve Potential Matches

4092::msc
01/20/2003
00:00:00.000

Select	PDC Number	Accession Number	Inconsistency Text	Type	Resolution
<input type="radio"/>	75f	001-31-003/P-2003-31	Amniocentesis date entered, but Amniocentesis declined or not indicated. Remove date.	F,PI	Resolved
<input type="radio"/>	75f	001-31-003/P-2003-31	Smith Lemli-Opitz syndrome diagnostic testing was provided or patient declined, but the patient's referral indication was not positive for SLOS.	CS,F,PI	Resolved
<input type="radio"/>	75f	001-31-003/P-2003-31	Smith Lemli-Opitz syndrome diagnostic testing was provided, but no Smith Lemli-Opitz syndrome results were given. Enter SLOS results.	F,PI	Resolved
<input type="radio"/>	75f	001-31-003/P-2003-31	Smith-Lemli-Opitz syndrome testing was not indicated or the patient declined, but there are Smith-Lemli-Opitz syndrome diagnostic testing results.	F,PI	Resolved
<input type="radio"/>	75f	001-31-003/P-2003-31	SLOS results, but referral is not SLOS positive. Select Smith-Lemli-Opitz syndrome Not Authorized or remove SLOS results.	F,PI	Resolved
<input type="radio"/>	75f	001-31-003/P-2003-31	SLOS result fetus not affected, but no 7-dehydrocholesterol results. Enter 7-DHC results.	F,PI	Resolved

Update

7

6. The inconsistency grid displays all of the inconsistencies for a given PSR as well as the PDC Number, Accession Number, Inconsistency Text, Type and Resolution. Type Column displays the various ways the inconsistency could have been resolved.

- Form (F) means that the particular inconsistency is due to either missing or inconsistent information on a particular PSR screen. If the missing information is entered on the screen or the inconsistent information is removed, the red text message will not be displayed at the top of the screen.
- Case Record (CR) or Current Status (CS) means that the particular inconsistency is due to missing or inconsistent information with the Case Record or Current Status. The CCC should be contacted for specific information regarding what information is incorrect.

PSR Inconsistencies (continued)

- c. Case Coordination Center (CCC) means that the particular inconsistency is due to information the CCC updated in the patient's case record but this new information is not reflected on the PSR.
- d. Policy Issue (PI) means that GDB staff will need to assist the PDC in resolving the inconsistent information. All inconsistencies have Policy Issue as a Type.

The Resolution column displays the status of the inconsistencies for the GDB staff (PSQA Monitor). The choices under the Resolution column are "Unresolved", "Resolved", and "Overridden". Unresolved means the data needed to resolve the inconsistency is missing. The "Resolve" choice will automatically be used by SIS if missing information is entered or the inconsistent information is corrected; the record will disappear from the inconsistencies grid once the Resolved choice is selected. "Overridden" should only be used if the missing information is not required for payment of a follow-up service under the Prenatal Screening Program or is not necessary information.

- 7. Click the radio button next to the inconsistency row displaying the inconsistency you would like to edit in the grid, then click the **Update** button to update the Resolution column for the selected inconsistency.

PSR Status

Follow Up Center >> PSR Status

This screen will allow you to view a list of Patient Services Reports (PSRs) with a status of “PSR needed”, “Approaching Late”, or “Late,” for a PDC. This will allow the user to flag PSRs that may need priority attention.

Access to PSR Status information for a PDC is specific to your login ID. This screen was modified to incorporate case id related changes for post PEII cases.

Follow Up Center >> PSR Status

Search Type:

View PSR Status

PDC Code:

PDC Name:

Select Accession Number	Referral	Last Name	First Name	Days PSR Pending	Status	Services Authorized
082-01-011/A - 2008-12	1st Trimester	PE PSR QTS	FIRST TRIMESTER	95	Late	GC, CVS, K
082-91-032/A - 2008-12	1st Trimester	PE PSR QTS	FIRST TRIMESTER	85	Late	GC, CVS, K
082-95-028/A - 2008-12	1st Trimester	PE PSR QTS	FIRST TRIMESTER	84	Late	GC, CVS, K
082-66-006/A - 2008-12	1st Trimester	PE PSR QTS	FIRST TRIMESTER	66	Late	GC, US, AM, KA, AF
082-07-035/A - 2008-12	1st Trimester	PE PSR QTS	FIRST TRIMESTER	63	Late	GC, US, AM, KA, AF
082-27-021/A - 2008-12	1st Trimester	PE PSR QTS	FIRST TRIMESTER	40	Late	GC, US, AM, KA, AF
172-05-091/A - 2008-22	1st Trimester	ABOUDHER	MANAZER	16	Late	GC, CVS, K
172-57-106/A - 2008-22	1st Trimester	TRANN	DISHI	13	Approaching Late	GC, CVS, K

1. Navigation and screen name.
2. Search Type.
3. For PDC users the **PDC Code** field will be pre-populated with your PDC information. If the field is not pre-populated, you must enter a **PDC Code**.
4. The **PDC Name** is displayed.
5. **Buttons:**
 - a. **Search** – returns all PSRs for the PDC with a status of “PSR Needed”, “Approaching Late,” or “Late”
 - b. **Cancel** – clears the **PDC Code** field.

PSR Status (continued)

6. The PSR status grid displays all PSRs for your PDC with a status of “PSR Needed”, “Approaching Late”, or “Late”. Clicking the accession number will display the Case Summary (PNS) screen. The “Days PSR Pending” column displays the number of days a PSR has been pending (calculated from the date the appointment status was changed to “Kept” or “GC Appt Kept - Dx Not Scheduled” on the **Appointments** screen and the trimester).
 - 1st Trimester case with appointment status “GC Appt Kept - Dx Not Scheduled” :
 - a. PSR status will be “PSR Needed” 0-2 days between appointment “GC Appt Kept - Dx Not Scheduled” and the present date.
 - b. PSR status will be “Approaching Late” 3-6 days between appointment “GC Appt Kept - Dx Not Scheduled” and the present date.
 - c. PSR status will be “Late” after 7 or more days from appointment “GC Appt Kept - Dx Not Scheduled”.
 - 1st Trimester case with appointment status “Kept”:
 - a. PSR status will be “PSR Needed” 0-7 days between appointment “Kept” and the present date.
 - b. PSR status will be “Approaching Late” 8-14 days between appointment “Kept” and the present date.
 - c. PSR status will be “Late” after 15 or more days from appointment “Kept”.
 - 2nd Trimester case with appointment status “Kept”:
 - a. PSR status will be “PSR Needed” 0-29 days between appointment “Kept” and the present date.
 - b. PSR status will be “Approaching Late” 30-44 days between appointment “Kept” and the present date.
 - c. PSR status will be “Late” after 45 or more days from appointment “Kept”.

Click a radio button on the PSR status grid, then click the **Enter PSR** button to enter PSR information for the selected case or you can click on the accession number for a particular patient in the PSR Status grid which takes you to the **Case Summary (PNS)** screen. On this screen there is an “Enter PSR” link on the top right corner of the screen.

7. **Referral** column will display case trimester as either “**1st Trimester**” or “**2nd Trimester**”.
8. **Services Authorized** column will show services authorized for the case for the selected PDC. The services listed here will be same as shown on Cases Referred screen with following exceptions:
 - a. If the "GC Appointment Kept. Dx Not Scheduled" status is selected, the services authorized will include GC only.
 - b. Once appointment status is changed to “Kept”, all authorized services will be listed in the Services Authorized column.
9. **Buttons:**
 - a. The **Enter PSR** button will take you to the Enter PSR screen.
 - b. The **Remove** button will remove selected case from pending PSR list.

Quarterly Report – Patients

Follow Up Center >> Quart Rept-Patients

The **Quarterly Rept-Patients** screen is used to enter PDC quarterly reports for non-prenatal screening (non-XAFP) patients.

FIGURE 1

Follow Up Center >> Quart Rept-Patients

Upload Qtrly Report

Center Name: PDC 102 Center #: 102

Fiscal Year: 2003 To: 2004

Quarter: 1

Section I: Indication for Prenatal Diagnosis

1. Age

Age	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
35								
36								
37								
38								
39								
40								
41								
42								
43								
44								
45								
>45								
Unknown								
Subtotal	0	0	0	0	0	0	0	0

1. Navigation and screen name.
2. **Center Name** and **Center #** are read-only, based on your log in ID and associated facility.
3. You must identify a **Fiscal Year** and **Quarter** for the data contained in the report. Only one report can be submitted for each Fiscal Year/Quarter (i.e. Fiscal Year is 2003 to 2004 in Quarter 1).

Quarter 1 is July –September

Quarter 2 is October – December

Quarter 3 is January – March

Quarter 4 is April – June

Quarterly Report – Patients (continued)

FIGURE 2

Follow Up Center >> Quart Rept-Patients

Upload Qtrly Report

Center Name: PDC 102 Center #: 102

Fiscal Year: 2003 To: 2004

Quarter: 1

Section I: Indication for Prenatal Diagnosis

1. Age

Age	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
35								
36								
37								
38								
39								
40								
41								
42								
43								
44								
45								
>45								
Unknown								
5 Subtotal	0	0	0	0	0	0	0	0

4. Spreadsheet: The spreadsheet area is used to enter numbers of non-prenatal screening (non-XAFP) patients. Only integers may be used (i.e. an entry of 4.5 is not allowed).

The fields mentioned below were recently added to this spreadsheet:

- Mitochondrial disorders in the "Other Heritable Disorders" Section.
- LargeNT in the "Other Indication for Counseling or Prenatal Services" Section.

- A new "Group Counseling" section was created including the "Number of Sessions" and "Number of women at Sessions" fields.

5. SIS will automatically calculate **Subtotals** for the sections that have a Subtotal row. The **Sum of the subtotals** and the **Grand total** are located on end **Section I: Indication for Prenatal Diagnosis** below table 5. **Unknown Indication** (Figure 4).

Quarterly Report – Patients (continued)

FIGURE 3

4

2. Maternal Concern								
	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Maternal Concern								
Subtotal	0	0	0	0	0	0	0	0

3. Family History								
a. Chromosome Abnormality								
	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Down Syndrome								
Trisomy 13								
Trisomy 18								
Chrom. Abn. in Parent								
Other								
Subtotal	0	0	0	0	0	0	0	0

b. NTD (Non-AFP referrals)								
	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
NTD (Non-AFP referrals)								
Subtotal	0	0	0	0	0	0	0	0

c. X-Linked								
	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Fragile X Syndrome								
Other								
Subtotal	0	0	0	0	0	0	0	0

Parental or Fetal for X-linked History		
	Biochemical	DNA
Fragile X Syndrome		
Other		

d. Family History or at Risk for:								
1. Hemoglobinopathies								
	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Hemoglobinopathies								
Subtotal	0	0	0	0	0	0	0	0

Parental or Fetal - Family History or at Risk for Hemoglobinopathies		
	Biochemical	DNA
Hemoglobinopathies		

Quarterly Report – Patients (continued)

FIGURE 4
2. Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Tay Sachs Disease								
Cystic Fibrosis								
Other								
Subtotal	0	0	0	0	0	0	0	0

Parental or Fetal – Family History or at Risk for Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Biochemical	DNA
Tay Sachs Disease:		
Cystic Fibrosis:		
Other:		

3. Other Heritable Disorders

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Other Heritable Disorders								
Mitochondrial Disorders								
Subtotal	0	0	0	0	0	0	0	0

4. Other Indication for Counseling or Prenatal Services

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
a. Abnormal Ultrasound								
b. Teratogen Exposure								
c. Multiple Miscarriages								
d. Non-XAFP Multiple Marker								
e. LargeNT								
f. Other								
Subtotal	0	0	0	0	0	0	0	0

5. Unknown Indication

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Unknown Indication								
Subtotal	0	0	0	0	0	0	0	0

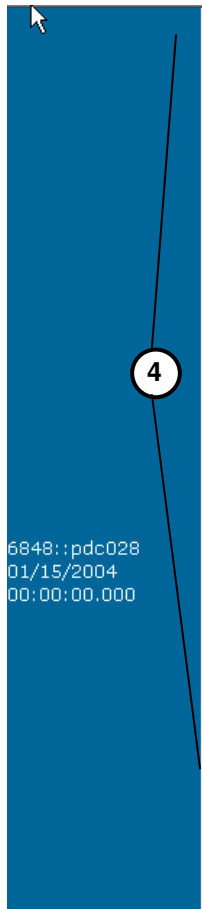
Sum of Subtotals	0	0	0	0	0	0	0	0
GRAND TOTAL								0

Section II: Repeat Samples

# of Amnios for Non-Growth	# of Amnios for CVS Culture Failure	# of Confirming PUBS	# of Repeat Samples for Other Indications

Quarterly Report – Patients (continued)

FIGURE 5

	Section III: Demographic Information on All Patients Served	
	1 Race/Ethnicity	
	Race/Ethnicity	Total
	White	
	Black	
	Native American	
	Middle Eastern	
	Asian Indian	
	Cambodian	
	Laotian	
	Vietnamese	
	Other SE Asian	
	Filipino	
	Samoaan	
	Hawaiian	
	Guamanian	
	Chinese	
	Japanese	
	Korean	
	Other Asian/Pacific Islander	
	Other	
	Unknown	
	Total Race/Ethnicity	0
	2 Hispanic Origin	
	Origin	Total
	Hispanic	
	Non-Hispanic	
	Unknown	
	Total Hisp/Non-Hisp	0

Quarterly Report – Patients (continued)

FIGURE 6

c::001
/09/2008
00:00.000

3 Residence

County Name **6**

of Patients

Total CA Residence

4

Residency Totals

CA Residence Total	Out of State Total	Non-US Res. Total	Res. Unknown Total

Section IV: Abnormalities (Please report all NTD and Chromosomal Abnormalities on Confidential Case Report forms)

Abnormalities	Number
Chromosomal Abnormalities	
Neural Tube Defect Abnormalities	
Abnormalities of Known Impact (Other than Chromosomal and/or NTD)	
Abnormalities of Questionable Impact (Other than Chromosomal and/or NTD)	
Total	0

Section V: Group Counselling

	Number
Number of Sessions	
Number of women at Sessions	

Total Recap

Section I Total	Race/Ethnicity Total	Hisp/Non-Hisp Total	Residence Total
0	0	0	0

Comments

7

Name of Person Completing Form:

Telephone Number: Ext. :

Date:

Before submitting this form, has it been reviewed by PDC Director? ☐ **9**

10

6. Under 3. Residence (County Name and Number of Patients)

- To Add a County: Click on the "Select" box for a dropdown list counties and select the county you want. Enter the number of patients in the textbox. Click on the "Add County to Grid" button.
- To Delete a County: Click on the checkbox next to the county you want to delete then click on the "Delete County from Grid" button.
- To Change the number of patients within a county: You must first delete the county within the grid (See 4b. above for deleting a county). You then must re-add this county again with the correct number of patients. (See 6a above for adding a county.)

Quarterly Report – Patients (continued)

Note: SIS will automatically total the number of patients you have added to each county and place this total in the **Total CA Residence** grid bar. Under **Total CA**

Residence grid bar there is the **Residency Totals**. Within the Residency Totals table, CA Residence Total will be populated automatically with the total from the Total CA Residence grid bar. However, it is the PDC's responsibility to enter the number of patients for the **Out of State Total**, **Non-US Res. Total** and **Res. Unknown Total**.

Note: Under the **Total Recap** table, the totals in **Section I**, **Race/Ethnicity**, **Hisp/Non-Hisp**, and **Residence** should match.

7. **Comments:** A text box is provided for comments. Only comments related to quarterly report data should be added here. Other information (such as PDC staff changes for example) should not be communicated using the comments field.
8. Contact Information of the person completing the form should be entered along with the date.
9. Review confirmation is required. You must check this box to confirm that the PDC Director has reviewed this report before submitting it to GDB.
10. **Buttons:**
 - a. **Save** – retains the entered data. The report may be saved as many times as desired before submission. You may save the data and log out of SIS. When you return, you may continue entering data on the screen at the point you logged out. Only one report per quarter for each fiscal year may be saved.

When you click the **Save** button, if the numbers under the **Total Recap** are not same the following warning message will appear “Your “Grand Total”, ‘Total Race/Ethnicity’, ‘Total Hisp/Non-Hisp’, and ‘Total Residence’ differs. Do you want to Save?” When this warning appears, you have the option of clicking on the **Ok** or **Cancel** buttons. When you click the **Ok** button, the data you entered on the screen will be saved. You need to go back and check the numbers under each section to make certain that they match. If they do not match, correct the numbers and again click on the **Save** button. If you click the **Cancel** button on this warning message, your data will not be saved but may continue data entry.
 - b. **Submit**- sends the report to GDB electronically. Note that data on this Quarterly report cannot be changed after clicking on the **Submit** button.
 - c. **Back** – returns the user to the previous SIS screen, discarding any changes that have not been saved.

Quarterly Report – Specimens

Follow Up Center >> Quart Rept-Specimens

The **Quart Rept-Specimens** screen allows users to enter quarterly reports for outside specimens.

FIGURE 1

Follow Up Center >> Quart Rept-Specimens

Center Name: PDC 102 Center #: 102

Fiscal Year: 2003 To: 2004

Quarter: 1

Section I: Indication for Prenatal Diagnosis

1. Age

Age	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
35					
36					
37					
38					
39					
40					
41					
42					
43					
44					
45					
>45					
Unknown					
Subtotal	0	0	0	0	0

1. Navigation and screen name.
2. **Center Name** and **Center #** are read-only, based on your log in ID and associated facility.
3. You must identify a **Fiscal Year** and **Quarter** for the data contained in the report. Only one report can be submitted for each Fiscal Year/Quarter (i.e. Fiscal Year is 2003 to 2004 in Quarter 1).
 Quarter 1 is July –September
 Quarter 2 is October – December
 Quarter 3 is January – March
 Quarter 4 is April – June
4. Spreadsheet – The spreadsheet area is used to enter numbers of Outside Specimens. Only integers may be used (i.e. an entry of 4.5 is not allowed).

Quarterly Report – Specimens (continued)

FIGURE 2

GDB-SIS

Follow Up Center » Quart Rept-Specimens

Center Name: PDC 102 Center #: 102
 Fiscal Year: 2003 To: 2004
 Quarter: 1

Section I: Indication for Prenatal Diagnosis
1. Age

Age	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
35					
36					
37					
38					
39					
40					
41					
42					
43					
44					
45					
>45					
Unknown					
Subtotal	0	0	0	0	0

The fields mentioned below were recently added to this spreadsheet:

- Mitochondrial disorders in the "Other Heritable Disorders" Section.
- LargeNT in the "Other Indication for Counseling or Prenatal Services" Section.

- SIS will automatically calculate **Subtotals** for the sections that have a Subtotal row. The **Sum of the subtotals** and the **Grand total** are located on end **Section I: Indication for Prenatal Diagnosis** below table 5. **Unknown Indication** (Figure 4).

Quarterly Report – Specimens (continued)

FIGURE 3

4

2. Maternal Concern					
	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Subtotal	0	0	0	0	0

3. Family History					
a. Chromosome Abnormality					
	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Down Syndrome					
Trisomy 13					
Trisomy 18					
Chrom. Abn. in Parent					
Other					
Subtotal	0	0	0	0	0

b. NTD (Non-AFP referrals)					
	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
NTD (Non-AFP referrals)					
Subtotal	0	0	0	0	0

c. X-Linked					
	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Fragile X Syndrome					
Other					
Subtotal	0	0	0	0	0

Parental or Fetal for X-linked History		
	Biochemical	DNA
Fragile X Syndrome		
Other		

d. Family History or at Risk for:					
1. Hemoglobinopathies					
	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Hemoglobinopathies					
Subtotal	0	0	0	0	0

Parental or Fetal – Family History or at Risk for Hemoglobinopathies		
	Biochemical	DNA
Hemoglobinopathies		

Quarterly Report – Specimens (continued)

FIGURE 4

4

2. Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Tay Sachs Disease					
Cystic Fibrosis					
Other					
Subtotal	0	0	0	0	0

Parental or Fetal – Family History or at Risk for Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Biochemical	DNA
Tay Sachs Disease:		
Cystic Fibrosis:		
Other:		

3. Other Heritable Disorders

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Other Heritable Disorders					
Mitochondrial Disorders					
Subtotal	0	0	0	0	0

4. Other Indication for Counseling or Prenatal Services

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
a. Abnormal Ultrasound					
b. Teratogen Exposure					
c. Multiple Miscarriages					
d. Non-XAFP Multiple Marker					
e. Large NT					
f. Other					
Subtotal	0	0	0	0	0

5. Unknown Indication

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Unknown Indication					
Subtotal	0	0	0	0	0

Sum of Subtotals	0	0	0	0	0
GRAND TOTAL					0

Section II: Repeat Samples

# of Amnios for Non-Growth	# of Amnios for CVS Culture Failure	# of Confirming PUBS	# of Repeat Samples for Other Indications

Quarterly Report – Specimens (continued)

FIGURE 5

4

sparmar::03a
08/15/2008
09:00:00.000

Section III: Demographic Information on All Patients Served

1 Race/Ethnicity

Race/Ethnicity	Total
White	
Black	
Native American	
Middle Eastern	
Asian Indian	
Cambodian	
Laotian	
Vietnamese	
Other SE Asian	
Filipino	
Samoan	
Hawaiian	
Guamanian	
Chinese	
Japanese	
Korean	
Other Asian/Pacific Islander	
Other	
Unknown	
Total Race/Ethnicity	0

2 Hispanic Origin

Origin	Total
Hispanic	
Non-Hispanic	
Unknown	
Total Hisp/Non-Hisp	0

Quarterly Report – Specimens (continued)

FIGURE 6

3 Residence 6

County Name

of Patients

County Name	# of Patients
<input type="button" value="Delete County From Grid"/>	
Total CA Residence	

Residency Totals

CA Residence Total	Out of State Total	Non-US Res. Total	Res. Unknown Total

Section IV: Abnormalities (Please report all NTD and Chromosomal Abnormalities on Confidential Case Report forms)

Abnormalities	Number
Chromosomal Abnormalities	
Neural Tube Defect Abnormalities	
Abnormalities of Known Impact (Other than Chromosomal and/or NTD)	
Abnormalities of Questionable Impact (Other than Chromosomal and/or NTD)	
Total	0

Total Recap

Section I Total	Race/Ethnicity Total	Hisp/Non-Hisp Total	Residence Total
0	0	0	0

Comments

7

Name of Person Completing Form:

Telephone Number: 8 - - Ext. :

Date: - -

Before submitting this form, has it been reviewed by PDC Director? 9 ☐

10

6. Under 3. Residence (County Name and Number of Patients)

- a. To Add a County: Click on the “Select” box for a dropdown list counties and select the county you want. Enter the number of patients in the textbox. Click on the “Add County to Grid” button.
- b. To Delete a County: Click on the checkbox next to the county you want to delete then click on the “Delete County from Grid” button.
- c. To Change the number of patients within a county: You must first delete the county within the grid (See 4b. above for deleting a county). You then must re-add this county again with the correct number of patients (See 6a. above for adding a county).

Quarterly Report – Specimens (continued)

Note: SIS will automatically total the number of patients you have added to each county and place this total in the **Total CA Residence** grid bar.

Under **Total CA Residence** grid bar there is the **Residency Totals**. Within the Residency Totals table, CA Residence Total will be populated automatically with the total from the Total CA Residence grid bar. However, it is the PDC's responsibility to enter the number of patients for the **Out of State Total**, **Non-US Res. Total** and **Res. Unknown Total**.

Note: Under the **Total Recap** table, the totals in **Section I**, **Race/Ethnicity**, **Hisp/Non-Hisp**, and **Residence** should match.

7. **Comments:** A text box is provided for comments.
8. Contact Information of person completing the form should be entered along with the date.
9. Review confirmation is required. You must check this box to confirm that the PDC Director has reviewed this report before submitting it to GDB.
10. **Buttons:**
 - a. **Save** – retains the entered data. The report may be saved as many times as desired before submission. You may save the data and log out of SIS. When you return, you may continue entering data on the screen at the point you logged out. Only one report per quarter for each fiscal year may be saved.

When you click the **Save** button, if the numbers under the **Total Recap** are not same the following warning message will appear “Your “Grand Total”, ‘Total Race/Ethnicity’, ‘Total Hisp/Non-Hisp’, and ‘Total Residence’ differs. Do you want to Save?” When this warning appears, you have the option of clicking on the **Ok** or **Cancel** buttons. When you click the **Ok** button, the data you entered on the screen will be saved. You need to go back and check the numbers under each section to make certain that they match. If they do not match, correct the numbers and click on the **Save** button again. If you click the **Cancel** button on this warning message, your data will not be saved, but you may continue do data entry.
 - b. **Submit**- sends the report to GDB electronically. Note that data on this Quarterly report cannot be changed after clicking on the **Submit** button.
 - c. **Back** – returns the user to the previous SIS screen discarding any changes that have not been saved.

Reassign CCC

Data Intake >> Case Summary (PNS) >> Re-assign CCC

OR

Data Intake >> Case Summary (NBS) >> Re-assign CCC

The **Re-assign CCC** screen displays the current Case Coordination Center (CCC) assigned to a client. This screen also allows the user to change which CCC is assigned to a client.

Data Intake >> Case Summary (PNS) >> Re-assign CCC

Update Case (PNS) Case Notes Link PNS Cases Re-assign CCC Tracking Events
 Appointments Services History Enter PSR Link Client to Entity Unlink Specimens
 GA Calculator

Client Name: SANTA, MONICA Date of Birth: 5/29/1963

Client - Reassign CCC

Accession Number	Current Assignment
176-48-161/A -2008-72	CHILDRENS HOSPITAL CENTRAL CALIFORNIA-45
219-93-025/P -2008-72	KAISER PERMANENTE-54

*New Assignment: SELECT
 Comment:

Save Clear

History

Accession Number	CCC Name	Start Date	End Date	Updated By
219-93-025/P -2008-72	KAISER PERMANENTE-54	08-08-2008		SYSTEM
176-48-161/A -2008-72	CHILDRENS HOSPITAL CENTRAL CALIFORNIA-45	06-26-2008		SYSTEM

- Client information is displayed in a read-only format, based on the client profile.
- Current Assignment** is displayed in a read-only format with all the accession numbers for the case.
- Select the new CCC in the **New Assignment** field. This is a required field. Notes or comments can be entered into the **Comment** field. When a New CCC is selected, all of the specimens for that case will be transferred to that CCC.
- Buttons:**
 - Save** – Saves the new CCC assignment. If the client is a Headline Case, then it will appear on the new CCCs Headline Case screen.
 - Clear** – clears the fields, discarding any unsaved data.
- The **History** table shows a list of CCCs the client has been assigned to in the past with all the accession numbers for the case. Start Date, End Date, and Updated By fields are recorded automatically by SIS.

Reassign CF Center

Data Intake >> Reassign CF

The screen allows a user to reassign a cystic fibrosis case to another CF Center.

FIGURE 1

GDB-SIS

Client/Case Search
Case Summary (NBS)
Cystic Fibrosis Service Report
Reassign CF
Enter Other Mutation Test Results
CFC Annual Patient Summary
View CFF File Records

Data Intake >> Reassign CF

Client Name: CHEN Date of Birth: 11/15/2000
Accession Number: 320-80-077/21-2000-72

Client - Reassign CF

Current Assignment: CF Center - Richmond
*New Assignment: SELECT
Comment:

History

CF Name	Start Date	End Date	Updated By
CF Center - Richmond	12-07-2006		Leslie Gaffney

jbrown1::CF01
03/02/2007
16:59:10.960

1. Displays client and case information in read-only format.
2. Displays the CF center to which the case is currently assigned in the **Current Assignment** field.
3. Select the new CF Center to which the case is assigned from the **New Assignment** list and enter any **Comments** related to the new assignment as required.
4. **Buttons:**
 - a. **Save:** Saves the record and does the following:
 - i. Places an End Date in the **History** grid for the old CF Center assignment
 - ii. Adds a new record to the **History** grid for the new CF Center assignment.
 - iii. Updates the **Current Assignment**
 - iv. Clears the **New Assignment** and **Comments** fields.
 - b. **Clear:** Clears the **New Assignment** and **Comments** fields without saving the changes.

Reassign Metabolic Center

Data Intake >> Reassign MC

This screen allows a user to reassign a metabolic case to another Metabolic Center.

FIGURE 1

Client - Reassign MC

Client Name: ABE BROWER, EYAL Date of Birth: 9/5/2006
 Accession Number: 262-95-216/31-2006-22

Current Assignment: UCSD METABOLIC CENTER
 *New Assignment: SELECT
 Comment:

Save Clear

MC Name	Start Date	End Date	Updated By
UCSD METABOLIC CENTER	09-20-2006		Claudia Grissom

lgaffney:MC78
 03/02/2007
 17:06:58.460

1. Displays client and case information in read-only format.
2. Displays the metabolic center to which the case is currently assigned in the **Current Assignment** field.
3. Select the new metabolic center to which the case is assigned from the **New Assignment** list and enter any **Comments** related to the new assignment as required.
4. **Buttons:**
 - a. **Save:** Saves the record and does the following:
 - i. Places an End Date in the **History** grid for the old metabolic center assignment
 - ii. Adds a new record to the **History** grid for the new metabolic center assignment.
 - iii. Updates the **Current Assignment**
 - iv. Clears the **New Assignment** and **Comments** fields.
 - b. **Clear:** Clears the **New Assignment** and **Comments** fields without saving the changes.

Remittance ID Status

Follow Up Center >> Remittance ID Status

The **Remittance ID Status** screen is used to display remittance payment information for approved services performed at a PDC. Once authorized services have been provided by the PDC, the PDC will document and submit service information to GDB in a Patient Services Report (PSR). Once all PSR inconsistencies have been resolved, the service rendered information will be sent from SIS to BSS for payment purposes. After BSS has processed the services, it will send remittance (warrant) information to SIS which can then be viewed by the PDCs and PSQA Monitor.

The screenshot shows the GDB-SIS interface. The top navigation bar includes tabs for Data Intake, Entity, Monitor, Follow Up Center (selected), CCC, and Utilities. The left sidebar lists various menu items, with 'Remittance ID Status' highlighted. The main content area is titled 'Follow Up Center >> Remittance ID Status' and contains a search form and a results table.

Search Form Fields:

- PDC Code: 36ah
- Organization Name: San Diego
- Date From: 05-01-2002
- Date To: 01-15-2005
- Buttons: Go, Clear

Results Table:

Remittance ID	Schedule Number	Schedule Date	Warrant Number	Warrant Date
36-2004-01	202016	07/23/2002	7680041	08/07/2002

1. Navigation and screen name.
2. Specify the search criteria for the payments you wish to view. You must enter **PDC Code** and select a **Date From** and a **Date To**.
3. **Buttons:**
 - a. Click the **Go** button to search for remittance information based on your search criteria.
 - b. Click the **Clear** button to clear the search criteria you entered above.
4. Search results grid displays the status of each remittance ID based on the search criteria.
5. Click the **Remittance ID** link to view the Services Rendered screen for the selected invoice.

Resend Mailers

Utilities >> Search for Mailers >> Resend Mailers

This screen enables the user to resend a mailer. The mailer can be mailed to the same address or physician, or to a different address or physician. This screen will also be used to allow access to view the original mailer in PDF format.

1. Click the **Change Address** checkbox to change the designated address for the mailer. The address information fields will become editable once this box is checked.
2. **Address Information:** SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
3. **Do not validate address** – Checking the box will deactivate the address validation feature.
4. **Buttons:**
 - a. **Send** – Sends the mailer to the address designated in the address fields.
 - b. **Back** – return to the previous screen.
 - c. **View Selected Mailer** – View an image of the original mailer in PDF format.

Resolve Duplicates

Data Intake >> Client/Case Search >> Resolve Duplicates

This screen allows you to resolve client duplicates by merging an existing client with its duplicate. SIS will automatically identify potential matches for the primary client profile that you are viewing. You can choose a match from the list SIS finds, or specify a client ID or accession number as the selected duplicate client. Exercise care when merging clients, as the action cannot be undone. A warning popup window will display when the Merge button is clicked, requiring you to confirm that you wish to merge the clients.

Resolve Duplicates (continued)

GDB-SIS

Data Intake
Entity
Monitor
Follow Up Center
CCC
Utilities

Client/Case Search

[View Client Profile](#)

[Specimen History](#)

[TRF Data Entry \(PNS\)](#)

[Case Summary \(PNS\)](#)

[Update Case \(PNS\)](#)

[TRF Data Entry \(NBS\)](#)

[Case Summary \(NBS\)](#)

[Update Case \(NBS\)](#)

[Lab Coft](#)

[View Edit Log](#)

[Resolve Duplicates](#)

[Maint Client Relation](#)

[Upload CCR](#)

[Add Test Results](#)

[Audit Data Entry](#)

[Expected Recall \(NBS\)](#)

[View List of CCR](#)

[NBS DC](#)

Data Intake » Client/Case Search » Resolve Duplicates

Client Name: AGUILAR , MARIE
Date of Birth: 5/27/1972

1

Merge	Name	Date of Birth	Social Security Number	Address (Number, Street)	Zip
<input type="checkbox"/>	Name 1	02-03-1999	123-12-1234	xxx	00000
<input type="checkbox"/>	Name 2	01-02-1999	123-12-1234	yyy	00000

Client ID:

Or

Accession Number: 002 - 44 - 152 / P - 2003 - 21

Display

3

	Primary Client	Selected Client
Name:	AGUILAR MARIE	AGUILAR ENITA
Date of Birth:	05/27/1972	05/21/1972
Time of Birth:		
Twin Status:		
Birthweight:		
Social Security Number:		
Address:	56420 STARSON AVE 1 JACKSON CA 95642-	64517 E 12TH STREET MERCED CA 95340-
Phone:	() - x	() - x
Ethnicity:	White	White
Maiden Name:		
Gender:	Female	Female
Mother's Name:		
Mother's Maiden Name:		

5

Merge

Cancel

15823::msc

12/06/2004

18:59:04.970

4

1. Potential Matches for the primary client are displayed in a potential match grid. If the duplicate client is in this list, check the box for that client record and click the **Display** button.
2. If you know the **Client ID** or **Accession Number** of the record you want to merge, you can enter it here.
3. **Display** button will:
 - a. Search for the client record you have checked, and load that record in the "Selected Client" column of Merge Data Grid.
 - b. Search for either the Client ID or Accession Number you have entered, and load that record in the "Selected Client" column of Merge Data Grid
4. Merge data grid will display the Primary Client and Selected Client details side by side for comparison. The selected client is obtained based on the client record you selected for display (see #3).
5. **Buttons:**
 - a. **Merge** button will merge the two clients. The selected client's record and personal information will be deleted. However, the other information, such as Address, Contact, Telecom, and Alias will be added to the primary client's record. Exercise care when merging clients, as the action cannot be undone.
 - b. **Cancel** button will cancel the operation and reload a blank screen.

Resolve Potential Matches from TRF

Monitor >> Resolve Potential Matches from TRF

The Potential Matches screen displays the details about the New (Incoming) and Potential Matches records found by automated system and in this page have the option to search potential matches based on Category, CCC, TRF# and Trimester. This screen has the options to Merging the client and Link Babies.

FIGURE 1

Category of Matching: NBS TRF Baby Clients

CCC: Select

TRF #:

Trimester: Select

Search Reset

New (Incoming) Record

Select Accession Number	Last Name	First Name	Maiden Name	DOB	Address1	City	Phone Number	SSN	CCC Accession Date
006-55-053/21-2007-32	MILLER	SAVANNAH		01/02/2007	3663 BULHANAN	RIVERSIDE	951-734-1718	53	01/06/2007

1 Display Potential Matches Remove from Screen 4

1. Search can be done using the following fields and all are in and condition.

a. **Category of Matching** - This select field and it has 5 values.

- i. PNS TRF Cases
- ii. PNS TRF Clients
- iii. NBS TRF Baby Clients
- iv. NBS TRF Mother Clients
- v. Other

Resolve Potential Matches from TRF - (continued)

- b. **CCC** - This is select field.
 - c. **TRF#** - This is entry field.
 - d. **Trimester** - This is select field and values are Trimester description.
 - i. 1st Trimester
 - ii. 2nd Trimester
2. Search & Reset buttons
- a. **Search** button - Allows searching the incoming TRF details for the selected/entered search condition. At least one search condition is required.
 - b. **Reset** button - Reset the page.
3. **New (Incoming) Grid** – Displays the new incoming records for the search condition and the following fields will be displayed in the grid.
- a. **Accession Number**
 - b. **Last Name**
 - c. **First Name**
 - d. **Maiden Name**
 - e. **DOB**
 - f. **Address1**
 - g. **City**
 - h. **Phone Number**
 - i. **SSN**
 - j. **CCC**
 - k. **Accession Date**
4. Display Potential Matches and Remove from screen buttons
- a. **Display Potential Matches** button - Displays the potential matches for the selected row from New (Incoming) Record grid.
 - b. **Remove from screen** button - The selected client will be removed from "New Incoming Record" grid and corresponding records also be removed.

Resolve Potential Matches from TRF - (continued)

FIGURE 2

Potential Matches **5**

Select	Client Score	Last Name	First Name	Maiden Name	DOB	Address1	City	Phone Number	SSN	Acc Date	Type of Most Recent Acc#	Case Match?
<input checked="" type="radio"/>	65.0	MARTINEZ	MICAELA	HERNANDEZ	01/05/1980	4727 SHADOW STONE ST	BAKERSFIELD	661-664-7521	610011179		119-53-058/21-1999-71	N
<input type="radio"/>	65.0	MARTINEZ	MICAELA	HERNANDEZ	01/05/1980	4727 SHADOW STONE ST	BAKERSFIELD	661-664-7521	610011179		119-90-044/31-1999-22	N
<input type="radio"/>	65.0	MARTINEZ	MICAELA	HERNANDEZ	01/05/1980	4727 SHADOW STONE ST	BAKERSFIELD	661-664-7521	610011179		121-46-052/21-1999-12	N

Display Details

6

Label	New (Incoming) Record	Existing Client Case Record
Client ID	34537582	25810269
Last Name	MILLER	MARTINEZ
First Name	SAVANNAH	MICAELA
Maiden Name		HERNANDEZ
Other Name	MILLERSAVANNAH	MARTINEZ MICAELA
DOB	1/2/2007	1/5/1980
Time of Birth	1258	
Address1	3663 BULHANAN	4727 SHADOW STONE ST
Address2	31	
City	RIVERSIDE	BAKERSFIELD
Zip Code	92503	93313
Phone Number	951-734-1718	661-664-7521
Previous Address1		3901 Q St
SSN		610011179
Medical Record Number	F00247894	797377
Ethnicity/Race	White	White, Hispanic, Unknown
Birth Weight	3332	
Twin Status		U
Sex	Female	Female
Clinician Name	JABAJI LEILA	FRELINGER RICHARD
Clinician Phone Number	909-861-1888	661-326-2000
GA Today	0	0
Number of Fetuses		Unknown
Patient's Weight		159.0
1st Trimester TRF#		
Current TRF#	2204606576	0486413085L
Interp of Most Recent Accession Number		Complete, Screen Negative

Merge Client Link Babies Clear **7**

msc::001
08/27/2008
09:48:51.060

Resolve Potential Matches from TRF - (continued)

5. **Potential Matches Grid** - Displays the top 5 Potential Matches records for the selected incoming record. Top 5 will be filtered based on the client score (match score). The following fields will be displayed in the grid.
 - a. **Client Score** - This is matched percentage by Netrics Client Matching system.
 - b. **Last Name**
 - c. **First Name**
 - d. **Maiden Name**
 - e. **DOB**
 - f. **Address1**
 - g. **Phone Number**
 - h. **SSN**
 - i. **Accession Date**
 - j. **Most Recent Accession #**
 - k. **Case Match?** - If any case match found then it will display "Y" otherwise "N".
6. **Display Details** button - Display the details for the selected record from New (Incoming) Record and Potential Matches. The following details will be displayed in the grid.
 - a. **Label** - description of the display details.
 - b. **New (Incoming) Record** - Display the details for the selected New incoming record.
 - c. **Existing Client Case Record** - Display the details for the selected Potential match record.
7. **Buttons**
 - a. **Merge Client** button –
 - i. If the clients are merged successfully then displays the success message on the page header and merged clients will be removed from this screen. If any error then error message will be displayed on the page header and clients will not be removed from this screen.
 - ii. This button will be enabled for PNS, NBS Mother and NBS Baby (if the selected client in Potential matches grid "Most Recent Accession #" has blank value.)
 - b. **Link Babies** button –
 - i. "Link NBS" screen will be displayed with pre populated baby details.
 - ii. This button will be enabled for selected NBS Baby "Most Recent Accession #" has value otherwise it will be disabled
 - c. **Clear** button - This will be clears the display details grid and the selection of the Potential Matches grid.

Review Coordinator Assignment

Monitor >> Review Coord Assign

This screen allows you to view the status and “age” of cases that have been assigned to each CCC. “Age” for NBS cases is based on the first accession day. “Age” for PNS cases is based on CCC assignment.

Monitor >> Review Coord Assign

CCC Number: 40

View Headline Cases: 10

"Age" for NBS = Days since First Accession Day.
 "Age" for PNS = Days since CCC Assignment

Clear Search Cancel

Search Results

Date Assigned to Coordinator	Accession No	Last Name	First Name	Interpretation	Tracking Status	Age	CCC Code
01/01/2003	301-92-013/P - 2003-12	GRIFFIN	NICOLA	Partial, Screen Positive; increased risk for NTD	PDC referral to site	17	2
01/03/2003	062-12-230/P - 2003-21	JARAMILLO	YANIR	Partial, Screen Positive; increased risk T21	Case Closed - PDC Appointment Kept	15	2
01/03/2003	320-44-557/P - 2003-22	BATEMAN	VICTORIA	Insufficient Patient Information	Obtain Correct Patient Information	15	2
01/03/2003	316-14-556/P - 2003-11	BUSTOS	ERIN	Insufficient Patient Information	Obtain Correct Patient Information	15	2
01/03/2003	102-06-077/P - 2003-21	CARRILLO	LAURA	Partial, Screen Positive; increased risk T21	Case Closed - PDC	15	2

1. Select the **CCC Number** that you wish to review.
2. Enter the “Days since Accession” in the **View Headline Cases** field. For example, if you enter “10”, the Search Results will return all cases that appear on a coordination center’s headline case screen that are at least 10 days old or more.
3. **Buttons:**
 - a. **Clear** button clears the information from all fields, and reloads a blank screen.
 - b. **Search** button initiates a search based on the criteria you have entered.
 - c. **Cancel** button cancels the current operation and directs you to the previous screen.
4. **Search Results** grid displays all cases on a coordination center’s headline case screen that match the search criteria. Clicking on a column header will sort the data by that column.
5. The **Accession Number** link directs you to the Case Summary screen for the selected case.

Schedule Site Visit

Monitor >> Schedule Site Visit

The **Schedule Site Visit** screen is used to schedule a visit to a State-approved Prenatal Diagnosis Center (PDC) Metabolic Center (MC) or Sickle Cell Counseling Center (SCCC) facility for the purpose of auditing the facility.

FIGURE 1

Navigation and screen name.

3rd level links.

Type of Center is a required field. You must select the type (PDC, SCCC, MC) to proceed with scheduling a site visit.

Entity Code is a required field. Since this is a read-only field, you must use the **Search for Entity** link to find the Entity Code and Organization Name for the site that will be visited.

Date of Visit for the site visit is a required field for scheduling future site visits.

Schedule Site Visit (continued)

FIGURE 2

Monitor >> Schedule Site Visit

Audit Results **Generate Audit Cases**

Type of Center: PDC

* Entity Code: 39q

Organization Name: Anaheim, Memorial Hos [Search For Entity](#)

* Date of Visit: 01-11-2005

Comments:

6 Save Cancel Generate Site Cases Enter Audit Results

7 **Site Visit History**

Date Of Visit	GDB Staff	Proposed Next Visit	Comments
1/11/2005			

8 Edit

3529::qaadmin
12/27/2004
16:21:23.830

6. Buttons:

- Save** - saves a site visit record for the facility and date you have identified. For PDC site visits, after you click the Save button an alert will notify the PDC of the site visit. If the site visit is scheduled more than 30 days in advance, the alert will be triggered at exactly 30 days before the site visit. If the site visit is schedule fewer than 30 days in advance, the alert will be sent immediately.
 - Cancel** clears all information in the fields above it discarding any unsaved information.
 - Generate Site Cases** button creates a list of cases from the facility that you wish to audit during the site visit after clicking the radio button next to one of the records in the Site Visit History grid.
 - After the site visit, click the radio button next to the scheduled site visit. Next click the **Enter Audit Results** button to enter the results of the site visit in SIS.
- The **Site Visit History** grid displays a list of all site visits that have been scheduled in SIS for the selected facility.
 - Edit Button:** Click the radio button next to one of the records in the Site Visit History grid, then click the **Edit** button to change schedule information for a site visit record.

Search For Mailers

Utilities >> Search For Mailers

This screen allows you to search for mailers that have been scheduled, sent, or cancelled based on several specimen specific, patient specific and mailer specific search criteria. Pending mailers can be cancelled from this screen. To resend mailers, there are links provided to navigate the “Resend Mailers” screen.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Utilities >> Search for Mailers

Change Password
View All Users
Batch Run Time Rept
Assign CCC/Lab
Maint Time Parameter
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test

3589::msc
01/27/2005
14:29:24.957

Accession Number
Last Name
First Name
Date of Birth
Date of Birth Range
Attention Line 1:
Attention Line 2:
Address (Number , Street):
Address (Apt / Suite #):
County:
City:
State:
Zip:
Country:
☐ Do not validate address
Provider/Entity Code
I Number/TRF Number
Status
Mailer Type
Trigger Date
Trigger Date Range
File Date
File Date Range

1

2

Search

1. Enter search criteria into these fields. Mailers cannot be searched just based on first and last name only; additional criteria must be specified to improve the effectiveness of the search. If the search returns more than 50 results, a warning will display to refine the search criteria.
2. **Search** button will initiate a search based on the search criteria entered.

Search For Mailers (continued)

FIGURE 2

4092::msc
01/18/2003
00:00:00.000

Search Results: 3

Client	Accession No.	Mailer Type	Trigger Date	File Date	Mailer Status	Action
rose perrant	019-00-093/P - 2003-22	Screen Positive	11/10/2004 9:04:23 PM	11/15/2004 9:04:23 PM	Pending	Cancel
rose perrant	019-00-093/P - 2003-22	Patient Notification	11/10/2004 9:04:23 PM	11/18/2004 9:04:23 PM	Pending	Cancel

5

3. **Search Results** grid will display all records that match your search criteria. Search results will also display all the mailers of all accession numbers which are related to the same case.
4. **Accession No.** link will direct to the Case Summary screen.
5. For pending mailers, the **Cancel** link will cancel the mailer. The screen will be reloaded and the mailer status will be updated to show "cancelled".

FIGURE 3

4092::msc
01/18/2003
00:00:00.000

Search Results:

Client	Accession No.	Mailer Type	Trigger Date	File Date	Mailer Status	Action
KAREN JOANS	017-35-357/P - 2003-22	Screen Positive	1/14/2003 12:00:00 AM	6/1/2004 12:00:00 AM	Sent	Resend
KAREN JOANS	017-35-357/P - 2003-22	Patient Notification	1/14/2003 12:00:00 AM	1/22/2003 12:00:00 AM	Cancelled	

6

6. For sent mailers, the **Resend** link will direct you to the Resend Mailers screen, allowing you to view the previous mailer, and resend if necessary.

Search for NT Data

Data Intake » Search for 1st T Specimen

The Search for NT Data screen is used to search for 1st T specimens

To navigate to Search for NT Data screen, you should log in as NT Practitioner and select the entity.

Search for NT Data screen

FIGURE 1

The screenshot shows a web browser window titled "Search for 1st T Specimen - Microsoft Internet Explorer". The browser's address bar shows the URL "http://localhost:8080/gdb-sis/". The page has a blue header with the "GDB-SIS" logo on the left and a "Data Intake" button on the right. The main content area is titled "Data Intake » Search for 1st T Specimen". It features a search form with two input fields: "TRF #" and "Accession Number". The "Accession Number" field is a masked input with a format of "____-____-____/____-____". Below the input fields are "Search" and "Reset" buttons. A blue sidebar on the left contains the text "Search for 1st T Specimen" and a timestamp "sdeb: 12/12/2008 00:00:00.000". The status bar at the bottom indicates "Session time remaining :00:56:50 seconds." and "Local intranet".

4. The Search can be made using TRF # or Accession Number.
5. **Buttons:**
 - a. The Search button searches for 1st T specimen using the TRF # or Accession Number. If data is already entered for the accession number by another NT Practitioner, then search is not allowed to proceed further.
 - b. Reset button resets the search.

Search for Tests

Monitor >> Search for Tests

This screen allows a user to search for a test or a group of tests on the basis of the program area (NBS or PNS) and other criteria like accession number.

FIGURE 1

1. Program Area: PNS

2. Adequacy Level: ☒ Analyte Level ☐ Specimen Level

3. Search on any of the following criteria:

Accession Start Number: 283-23-090/P-2006-71

Accession End Number: 283-23-090/P-2006-71

Lab Code: N071 -KAISER NORTH REGIONAL LABORATORY

Test Type: INH

Run Date:

5. Go Clear

6. Search Results:

Accession Number	Test Type	Adequacy	Values	Run Date
283-23-090/P-2006-71	INH	H	287.8300 Pg/mL	10-10-2006

7. Change Adequacy Status

- Program Area** is a required field which includes two options, NBS and PNS. If the user selects PNS, the screen will appear as above. If the user selects NBS, the **Search Results** grid will not appear.
- Adequacy Level:** User can choose which type. Note: If analyte values are not present, search will return one row for each test.
- Accession Start Number:** If accession number is entered, then both start and end numbers are required.
- Lab Code, Test Type** and **Run Date** may be entered as search criteria. At least two of the three must be entered.
- Click **Go** button to enter data or **Clear** to clear the data fields.
- Search Results:** This grid displays all analytes for the case and one or more tests can be selected to change the adequacy status.
- Select the appropriate case and click the **Change Adequacy Status** button which takes the user to a different screen where the **Adequacy Status** can be changed.

Search HIPAA

Monitor >> Search HIPAA

This screen allows you to search for existing HIPAA sample studies.

Search For:

Study ID:

Study Name:

Contact Name:

Start Date:

End Date:

Search Results:

Study ID	Study Name	Contact Name	Study Date
<input type="radio"/> 1	TestStudy	Marshall	12/8/2003 12:00:00 AM

1. Enter **Search For** criteria in these fields. SIS will search for any combination of criteria that you enter.
2. **Search** button initiates a search based on the entered criteria.
3. **Search Results** grid displays all sample studies matching your search criteria. Select the sample study you wish to view and/or edit by using the radio buttons.
4. **Go** button will direct you to the HIPAA Information screen, which allows you to view and edit the sample study you selected using the radio buttons. If no search criteria are entered, the Go button will direct you to the HIPAA screen, allowing you to create and enter a new study.

Search NBS Form

Monitor >> Search NBS Form

This screen allows you to search for NBS forms that have been entered into SIS.

Monitor >> Search NBS Form

* Baby's Last Name:

Sex:

Birth Date:

Birth Time:

Birth Weight (grams):

* Mother's Last Name:

Mother's First Name:

Mother's Maiden Name:

NBS Spec Coll Facility Code:

* ☐ NBS - NO
☐ NBS - OH
☐ NBS - MR
☐ NBS - TR

Search Results

Form Type	Status	Patient Last Name	Sex	Date of Birth	Mother's Last Name	Mother's First Name	Hospital Code

1. Enter values in the search criteria fields. **Baby's Last Name, Mother's Last Name, and the Test Results Form type (NBS - NO, NBS - OH, NBS - MR, or NBS - TR)** are all required fields.
2. **Buttons:**
 - a. **Search** – Search for records matching the entered search criteria
 - b. **Cancel** – cancel the search.
3. Records matching the search criteria are displayed in the **Search Results** table.

Search Quarterly Report

Monitor >> Search Qtrly Report

The **Search Qtrly Report** screen is used to find and view both Patient and Outside Specimen Quarterly Reports for a given PDC.

Monitor >> Search Qtrly Report

*PDC Code: 75e Search

PDC Name: Kaiser--San Francisco

*Fiscal Year: 2003-2004

*Quarter: All

Go Clear

PDC Code	Fiscal Year	Quarter	PDC Patient Report Sub. Date	Outside Spec. Report Sub. Date
75e	2003-2004	4	Missing	Missing
75e	2003-2004	3	Missing	Missing
75e	2003-2004	2	Missing	Missing
75e	2003-2004	1	11-20-2003	Missing

1. PDC Code is a required field. Enter the **PDC Code** (if known) or;
2. Click the **Search** link to search for a PDC Code and PDC Name.
3. **Fiscal Year** and **Quarter** are required fields. Specify a date range (e.g. 2003-2004) for the Fiscal Year and select a quarter number (1-4 or "All") for the Quarter.
4. **Buttons:**
 - a. Click the **Go** button to search for Quarterly Report information with the criteria specified above.
 - b. Click the **Clear** button to clear the search criteria.
5. The results of your search are displayed in the grid at the bottom of the screen.
6. Click the date link in either the **PDC Patient Report Sub. Date** column or in the **Outside Spec. Report Sub. Date** column to view the report submitted by the PDC on that date. Click the **Missing** hyperlink to navigate to the Quart Rept-Patients or Quart Rept-Specimens screen for the selected PDC, Fiscal Year and Quarter where you can enter Quarterly Report Data.

Search Relationships

Data Intake >> Maint Client Relation >> Search Relationships

Once you have specified a client on the Maintain Client Relationships screen, the **Search Relationships** screen allows you to search for another client with whom to create a relationship, such as child, parent or sibling. This screen will be displayed after clicking the Add button on the Maintain Client Relationships screen. You may search using the Accession Number or Form Number alone, or by entering at least two other criteria together.

FIGURE 1

Search Relationships

Client Name: GARCIA, JENNIFER Date of Birth: 8/2/1983

Last Name: GARCIA
 First Name: MARA
 Date of Birth: [Month] [Day] [Year]
 Days Range: [Days]
 OR Birth Month and Day: [Month] [Day]
 Social Security Number: [SSN]
 Collection Date: [Date]
 Maiden Name: [Maiden Name]
 Accession Number: [Accession Number]
 Form Number: [Form Number]
 Trait Service Code: [Code]
 Hospital Code: [Code]
 Provider Name: [Name]
 Phone: [Phone]
 Address: [Address]
 Address (Number, Street): [Address]
 Address (Apt / Suite #): [Address]
 City: [City]
 State: [State]
 Zip: [Zip]
 Search In: [Search In]
 Search [Search] [Reset]

Search Results

Select	Relationship to Client Name	Date of Birth	Social Security Number	Maiden
<input type="checkbox"/>	Select	GARCIA MARA	10/04/1978	FRANCO

1. The original client is displayed in a read-only format, based on the client selected in the Maintain Client Relation screen.
2. Accession Number or Form Number can be used individually as search criteria. If neither the Accession Number nor Form Number is available, at least two of the remaining fields must be used together in order to search.

Search Relationships (continued)

FIGURE 2

GDB-SIS

Data Intake **Entity** **Monitor** **Follow Up Center** **CCC**

Data Intake > Maint Client Relation > Search Relationships

Search Relationships

Client Name: GARCIA, JENNIFER Date of Birth: 8/2/1983

Last Name: GARCIA
 First Name: MARA
 Date of Birth: MM/DD/YYYY
 Days Range: 0
 OR Birth Month and Day: Month/Day
 Social Security Number: MM/DD/YYYY
 Collection Date: MM/DD/YYYY
 Maiden Name:
 Accession Number: MM/DD/YYYY
 Form Number:
 Trait Service Code:
 Hospital Code:
 Provider Name:
 Phone: MM/DD/YYYY Ext.:
 Address:
 Address (Number, Street):
 Address (Apt / Suite #):
 City:
 State: Select
 Zip: MM/DD/YYYY
☐ Do not validate address
☐ Partial Name ☐ Phonetic Spelling

Search In: Search Reset

Search Results

Select	Relationship to Client Name	Date of Birth	Social Security Number	Maiden
<input type="checkbox"/>	Select GARCIA MARA	10/04/1978		FRANCO

Save Cancel

4092::msc
01/18/2003
00:00:00.000

3. Search Options allows you to specify the type of search you wish to perform.
 - a. **Do not validate address** disables the SIS automatic address correction process. If you allow SIS to validate addresses you should ensure that the address provide by SIS is desired.
 - b. **Partial Name** allows you to enter part of a name, and return all matching records.
 - c. **Phonetic Spelling** allows you to enter the phonetic spelling of a name, and return all matching records.

Search Relationships (continued)

FIGURE 3

GDB-SIS

Data Intake **Entity** **Monitor** **Follow Up Center** **CCC**

Data Intake >> Maint Client Relation >> Search Relationships

Search Relationships

Client Name: GARCIA , JENNIFER Date of Birth: 8/2/1983

Last Name: GARCIA

First Name: MARA

Date of Birth: [Calendar Icon]

Days Range: 0

OR Birth Month and Day: [Month] [Day]

Social Security Number: [Field]

Collection Date: [Calendar Icon]

Maiden Name: [Field]

Accession Number: [Field]

Form Number: [Field]

Trait Service Code: [Field]

Hospital Code: [Field]

Provider Name: [Field]

Phone: [Field] Ext. : [Field]

Address: [Field]

Address (Number , Street): [Field]

Address (Apt / Suite #): [Field]

City: [Field]

State: Select

Zip: [Field]

☐ Do not validate address

☐ Partial Name ☐ Phonetic Spelling

Search In:

4 Search Reset

Search Results

Select	Relationship to Client Name	Date of Birth	Social Security Number	Maiden
<input type="checkbox"/>	Select	GARCIA MARA	10/04/1978	FRANCO

Save Cancel

4092::msc
01/18/2003
00:00:00.000

4. Buttons:

- Search** – Initiates a search based on the search criteria you have entered.
- Reset** – When used before you click the Search button, will clear all information from all fields. When used after you have clicked the Search button, the Reset button will clear all search criteria fields, as well as any search results in the Search Results grid.

Search Relationships (continued)

FIGURE 4

GDB-SIS

Data Intake **Entity** **Monitor** **Follow Up Center** **CCC**

Data Intake >> Maint Client Relation >> Search Relationships

Search Relationships

Client Name: GARCIA, JENNIFER Date of Birth: 8/2/1983

Last Name: GARCIA

First Name: MARA

Date of Birth: [Month] [Day] [Year]

Days Range: 0

OR Birth Month and Day: [Month] [Day]

Social Security Number: [Number]

Collection Date: [Month] [Day] [Year]

Maiden Name: [Text]

Accession Number: [Text]

Form Number: [Text]

Trait Service Code: [Text]

Hospital Code: [Text]

Provider Name: [Text]

Phone: [Text] Ext.: [Text]

Address: [Text]

Address (Number, Street): [Text]

Address (Apt / Suite #): [Text]

City: [Text]

State: [Select]

Zip: [Text]

☐ Do not validate address

☐ Partial Name ☐ Phonetic Spelling

Search In: [Text]

Search Results 5

Select	Relationship to Client Name	Date of Birth	Social Security Number	Maiden
<input type="checkbox"/>	[Select]	GARCIA MARA	10/04/1978	FRANCO

4092::msc
01/18/2003
00:00:00.000

- Search Results** grid will display all records that match your search criteria. You may establish a relationship between the original client (see #1) and a client in the Search Results grid by checking the box in the Select column, selecting a relationship from the Relationship to Client dropdown (this should be the relationship of the person in the grid row to the person in the header), and then clicking the **Save** button.

Search Relationships (continued)

FIGURE 5

4092::msc
01/18/2003
00:00:00.000

6

6. Buttons:

- Save** – Saves the relationship data you have specified in the Search Results grid. A record will be added to Current Relationships grid in the Maintain Client Relation screen.
- Cancel** – Cancels the current activity and the user is returned to the Maintain Client Relation screen.

Security Groups

Utilities >> View Security Groups >> Security Groups

The **Security Groups** screen is used to create and edit security group profiles.

FIGURE 1

1. To add a new security group, enter the **Group Name** (required) and **Group Description** (required). The **Group ID** will be created automatically, and is a read-only field.
2. **Buttons:**
 - a. Click the **New** button to create a new security group, once you've entered the Group Name and Description.
 - b. Click the **Back** button to return to the View Security Groups screen, discarding any unsaved information you have entered.

Security Groups (continued)

FIGURE 2

The screenshot displays the GDB-SIS application interface. At the top, there is a navigation bar with tabs for 'Data Intake', 'Entity', 'Monitor', 'Follow Up Center', 'CCC', and 'Utilities'. The 'Utilities' tab is active. On the left, a sidebar menu lists various functions, with 'View Security Groups' highlighted. The main content area shows the 'Security Groups' configuration page. It includes a breadcrumb trail: 'Utilities >> View Security Groups >> Security Groups'. The form contains the following elements:

- Group ID:** A read-only field displaying the value '2'.
- *Group Name:** A text field containing 'Coordinator Center - NBS', which is circled with a '3'.
- *Group Description:** An empty text field, circled with a '4'.
- Buttons:** 'Update' and 'Back' buttons located at the bottom of the form.

3. You may also update an existing security group's **Group Name** and/or **Group Description**. The **Group ID** field is read-only, and cannot be edited.
4. **Buttons:**
 - a. Click the **Update** button to update the security group profile, once you've edited the Group Name or Description.
 - b. Click the **Back** button to return to the View Security Groups screen, discarding any unsaved changes.

Select Entity Type

The **Select Entity Type** screen is used by all SIS users and is displayed immediately after entering your User Sign in ID and Password. If you have access rights in SIS to login as more than one entity type, you can select which entity you would like to login as using this screen.

Select	Entity Type	Entity Name
<input type="radio"/>	Case Coordination Center (CCC)	GENETIC DISEASE BRANCH - PNS
<input type="radio"/>	Government Agency	GDB

Submit Cancel

1. Select your **Entity Type** from the grid.
2. **Buttons:**
 - a. **Submit** – once you have selected your entity, click the Submit button to proceed to your SIS welcome screen. The welcome screen is based on your Entity Type.
 - b. **Cancel** – cancel your selection and return to the SIS Sign-in screen.

Services History

Data Intake >> Case Summary (PNS) >> Services History

The **Services History** screen is used to view all of the services that have been performed by a PDC for a given patient or case. To view this screen click on the **Services History** link at the top of the Case Summary (PNS) screen for the selected patient.

GDB-SIS

Data Intake Monitor Follow Up Center CCC Utilities

Client/Case Search
View Client Profile
Case Summary (PNS)

Data Intake >> Case Summary (PNS) >> Services History

Appointments Services History Enter PSR GA Calculator

Client Name: AARONS, SHANNON Date of Birth: 8/7/1963
Accession Number: 232-42-006/P-2008-62

Accession Number 1 232 - 42 - 006 / P - 2008 - 62 Back 2
Patient Name AARONS, SHANNON

Services Provided 3

Line #	Date	Accession Number	Referral	Service Provided	Site Code	2nd Srvc Auth	Provider Last Name, First Name	Invoice No.
1	7/24/2008	189-78-141/A - 2008-64	1st Trimester	Genetic Counseling	03a		Filkins, Karen	
2	9/26/2008	189-78-141/A - 2008-64 6	1st Trimester	Modified Genetic Counseling	03a		Filkins, Karen	5
4 4	9/26/2008	189-78-141/A - 2008-64	1st Trimester	Ultrasound 8	03a 9		Filkins, Karen	
4	9/26/2008	189-78-141/A - 2008-64	1st Trimester	Amniocentesis	03a	10	Filkins, Karen	11
5	9/26/2008	189-78-141/A - 2008-64	1st Trimester	AF-AFP/ACH E Analysis	03a			

sparmar::03a
08/19/2008
15:00:42.110

1. **Accession Number** will be auto-populated based on the Case Summary (PNS) screen.
2. Click the **Back** button to return to the **Client/Case Search** screen.
3. The **Services Provided** grid displays all of the services that were performed by the PDC and entered on the PSR for the selected case.
4. Click the **Line #** link (1, 2 etc.) to go to the associated PSR service screen.
5. Click the **Invoice No.** link to go to the Remittance ID Status screen and display information pertinent to the selected invoice.
6. All accession numbers related to case will be displayed.
7. **Trimester** for related accession number will be displayed.
8. **Service Provided** name will be displayed.
Following new 1st Trimester services will be listed on this screen:
 - 1st T GC
 - US
 - Amnio
 - KA
 - AF
9. **PDC Code** will be displayed.
10. **2nd service authorization** will be displayed.
11. **Provider** name will be displayed.

Services Rendered

Follow Up Center >> Cases Referred >> Services Rendered

The **Services Rendered** screen is used to display a summary of all services that have been provided by a given PDC and submitted to BSS for payment during a given time frame. Once a search has been performed the results are displayed by Satellite Code in a grid.

Follow Up Center >> Services Rendered

*PDC Code: 03a Search
 *PDC Name: Prenatal Diagnosis of Northern Calif.
 Month: January Days: 1-15 Year: 2008
 Invoice Number: []

Go Clear

Satellite Code	Accession Number	Last Name	First Name	Date of Service	1st Trimester			2nd Trimester			AFK	FTK	PUBS	PB	SLOS	2nd Op	Admin Fee
					GC	CVS	Guidance US	Mod US	Amnio	Karyo							
b	005-98-053/P - 2008-11			01/09/2008	1	0	0	0	0	1	0	0	0	0	0	0	1
f	334-44-056/P - 2007-11			12/10/2007	1	0	0	0	0	1	1	1	0	0	0	0	1
f	337-92-071/P - 2007-11			12/07/2007	1	0	0	0	0	1	1	1	0	0	0	0	1
f	346-05-073/P - 2007-11			12/17/2007	1	0	0	0	0	1	0	0	0	0	0	0	1
Total					55	0	0	0	0	55	21	21	21	0	0	0	55

1 2

javila::001
07/08/2008
12:00:00.000

- Navigation and screen name.
- Specify the search criteria for the services you wish to display. **PDC Code**, **Month**, **Day** and calendar **Year** are required fields. You may also enter a Remittance ID. Services rendered can be viewed for two bi-weekly periods each month (1st – 15th and 16th – 31st).
 - All eligible PSRs with an “inconsistency resolved date” that falls within the two weeks preceding the date the Business Services System (BSS) interface runs (on the 1st and 16th of each month) will be sent from SIS to BSS for payment processing.

Services Rendered (continued)

3. **Buttons:**

- a. **Go** - click the **Go** button to search for a summary of the services provided, based on the specified criteria.
- b. **Clear** - click the **Clear** button to clear the search criteria you entered above.

4. **Search results** grid displays totals for each satellite of the specified PDC. Services are grouped based on trimester under the headings “1st Trimester” and “2nd Trimester”. Following new services are listed along with the existing services.

- a. CVS Guidance US
- b. CVS
- c. K (Karyotype by CVS)
- d. Mod GC (Modified GC)

5. Click the **Accession Number** link to view the Case Summary (PNS) screen for the selected case. You can click the Enter PSR link on the Case Summary (PNS screen) to verify services that were entered on the PSR.

6. **Date of Service** column shows service provided date.

Set Case Alerts

CCC >> Headline Cases (NBS) >> Set Case Alerts

OR

CCC >> Headline Cases (PNS) >> Set Case Alerts

This screen allows selected users to create and set an alert (custom alert) as a future reminder to take action on a case. The user has the ability to specify the alert text, and the date and time at which the alert should be triggered. The CCC may navigate to this screen by clicking the Set Case Alert 3rd level link on the Headline Case screen. The user can also view all the alerts (custom and pre-defined) set for a case based on access levels. User can navigate from case summary or headline case grid.

FIGURE 1

Headline Cases (PNS)

CCC >> Headline Cases (PNS) >> Set Case Alerts

Set Case Alerts

Valid Specimens (used for Risk Assessment)

Trimester	Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
2nd Trimester	222-06-430/P -2008-12	08/01/2008	2nd T Quad + NT: Screen Positive for T21, T18	Arrange Immediate Referral

Associated Specimens

Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
179-86-371/A -2008-12	06/27/2008	1st T: Inadequate Specimen	Tell Clinician Inadequate Specimen

Name: ZUCKERMAN RITSUKO

Time: []-[]-[] []

Date: []-[]-[] []

Text: []

Back Save Clear

View Case Summary

Current Alerts Pertaining to Case

Cancel Alert	Trimester	Accn Number	Interpretation	Date Set	Alert Text
<input type="checkbox"/>	1st Trimester	179-86-371/A -2008-12	1st T: Inadequate Specimen	8/19/2008 8:20:00 AM	"I" number on the TRF differs from the hospital code on the TRF
<input type="checkbox"/>	1st Trimester	179-86-371/A -2008-12	1st T: Inadequate Specimen	8/1/2008 9:15:00 AM	This case is over 15 day old, Please investigate
<input type="checkbox"/>	2nd Trimester	222-06-430/P -2008-12	2nd T Quad + NT: Screen Positive for T21, T18	8/12/2008 4:22:00 AM	Clinician or Patient address is invalid from TRF entry.

1. The screen displays the **Valid specimens** and **Associated specimens** in separate grids on this screen. The user will need to select an accession number to which a new alert needs to be associated to.
2. The client **Name** is displayed in a read-only format.
3. When entering a custom alert, select accession number, enter the **Time** and **Date** upon which the alert should be triggered in the **Time** and **Date** fields. You may also use the calendar function for convenience. Note the time is in 24-hour format. When viewing an alert that has already been triggered, the time and date will be displayed in a read-only format.

Set Case Alerts (Continued)

FIGURE 2

Headline Cases (PNS)

CCC » Headline Cases (PNS) » Set Case Alerts

Set Case Alerts

Valid Specimens (used for Risk Assessment)

Trimester	Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
<input type="radio"/> 2nd Trimester	222-06-430/P -2008-12	08/01/2008	2nd T Quad + NT: Screen Positive for T21, T18	Arrange Immediate Referral

Associated Specimens

Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
<input type="radio"/> 179-86-371/A -2008-12	06/27/2008	1st T: Inadequate Specimen	Tell Clinician Inadequate Specimen

Name: ZUCKERMAN RITSUKO

Time:

Date:

Text:

[View Case Summary](#)

Current Alerts Pertaining to Case

Cancel Alert	Trimester	Accn Number	Interpretation	Date Set	Alert Text
<input type="checkbox"/>	1st Trimester	179-86-371/A -2008-12	1st T: Inadequate Specimen	8/19/2008 8:20:00 AM	"I" number on the TRF differs from the hospital code on the TRF
<input type="checkbox"/>	1st Trimester	179-86-371/A -2008-12	1st T: Inadequate Specimen	8/1/2008 9:15:00 AM	This case is over 15 day old, Please investigate
<input type="checkbox"/>	2nd Trimester	222-06-430/P -2008-12	2nd T Quad + NT: Screen Positive for T21, T18	8/12/2008 4:22:00 AM	Clinician or Patient address is invalid from TRF entry.

4. You may enter, update or view the alert text in the **Text** field for a custom alert. Or, if you are viewing a pre-defined system generated, the alert text will be displayed in a read-only format.
5. **Buttons:**
 - a. **Cancel** – cancels your actions without saving.
 - b. **Save** – Saves a new alert, or saves the changes to an existing alert.
 - c. **Clear** – clears the fields without saving.
6. **View Case Summary hyperlink** navigates the user to the corresponding case summary screen
7. Existing alerts for the case are displayed in the **Current Alerts Pertaining to Case** grid. If an alert is entered for two different accession numbers, it will be listed twice in the Alerts grid.
8. Click the checkboxes in the **Cancel Alerts** column, then click the Save button to cancel one or more alerts and remove them from the alerts grid.

Set Case Alerts (Continued)

FIGURE 3

3464::nbs001
01/11/2005
11:57:44.303

CCC » Headline Cases (NBS) » Set Case Alerts

Set Case Alerts

Accession Number 310-90-002/21-2004-72

Name JACKSON VENUS

Time

Date

Text

Cancel Save Clear

Current Alerts Pertaining to Case

Cancel Alert	Date Set	Alert Text
<input type="checkbox"/>	11/20/2004 12:00:00 AM	This case is over 15 days old. Please investigate.
<input type="checkbox"/>	1/3/2005 9:06:27 PM	"I" number on the TRF differs from the hospital code on the TRF.
<input type="checkbox"/>	1/3/2005 9:19:17 PM	Clinician or patient address is invalid from TRF entry.

For Pre PEII or NBS case screen will be displayed as Figure 3

9. The client **Accession Number** and **Name** are displayed in a read-only format.
10. When entering a custom alert, enter the time and date upon which the alert should be triggered in the Time and Date fields. You may also use the calendar function for convenience. Note the time is in 24-hour format. When viewing an alert that has already been triggered, the time and date will be displayed in a read-only format.
11. You may enter, update or view the alert text in the **Text** field for a custom alert. Or, if you are viewing a pre-defined system generated, the alert text will be displayed in a read-only format.
12. **Buttons:**
 - a. **Cancel** – cancels your actions without saving.
 - b. **Save** – Saves a new alert, or saves the changes to an existing alert.
 - c. **Clear** – clears the fields without saving.

SIS Sign-In

This screen acts as the gatekeeper for SIS. It requires input of a personal User Sign in ID, and a personal Password to access the system. Your ID and password determine the screens to which you will have access.

The screenshot shows the GDB-SIS Sign-In interface. At the top is a blue header with the 'GDB-SIS' logo. Below the header is a blue sidebar on the left. The main content area is white and contains the following elements:

- User Sign in ID:** A text label followed by a text input field, indicated by callout 1.
- Password:** A text label followed by a password input field, indicated by callout 2.
- Buttons:** Two buttons, 'Sign In' and 'Clear', located below the password field, indicated by callout 3.
- Technical Assistance Link:** A link labeled 'click here' below the buttons, indicated by callout 4.
- VeriSign Secure Site:** A circular logo with the text 'VeriSign Secure Site' and 'click to verify' below it.

1. Enter your personal ID in the **User Sign in ID**
2. Enter your personal password in the **Password** field.
3. **Buttons:**
 - a. Click **Sign In** button to log into SIS.
 - b. The **Clear** button clears entered fields.
4. For technical assistance, for example, if you are unable to log in, click the “click here” link.

Special Payment Authorization

Monitor >> Special Pay Auth

The **Special Pay Auth** screen is used to record authorization for, or denial of a special service for a given accession number. In addition, you can view special payments that have already been authorized and/or denied for an accession number.

FIGURE 1

Client Information

*Accession Number: (1) 170-31-139/A-2008-12 Search (2)

Name: (3) AARON

Case becomes 24 weeks on: (4) 9/5/2008

Gestational Age Today: (5) 38 Weeks 0 Days

Show Special Authorization Services (6)

*PDC Number: (6) Search (7)

Authorize All Services: ☐ (GC, U/S, Amnio, KARYO, AFAPP) ☐ (GC, CVS, K)

Services:

- ☐ Genetic Counseling
- ☐ Ultrasound
- ☐ Amniocentesis
- ☐ Fetal Tissue Karyotype
- ☐ Placental Biopsy
- ☐ PUBS
- ☐ SLOS Diagnostic Testing
- ☐ Second Opinion Ultrasound
- ☐ AF-AFP/AChE Analysis
- ☐ Analysis on Amniotic Fluid with Karyotype
- ☐ Chorionic Villus Sampling
- ☐ Karyotype by CVS
- ☐ Modified Genetic Counseling

*Last Name of Requestor:

1. The **Accession Number** field is required to enter or view special service authorizations. The Client Name may also be entered.
2. Clicking the **Search** link will allow you to search for an Accession Number using the Client/Case Search screen.
3. This field displays the date on which the case attains 24 weeks Gestational Age.
4. This field displays the Gestational Age of the case on the Login Date.
5. To View Existing Special Service Authorizations or Denials: Click the **Show Special Authorization Services** button to display the History of Special Payment Authorizations grid (see **FIGURE 3**) for the Accession Number you have entered.
6. To Enter Special Service Authorizations or Denials: The **PDC Number** field is required in order to record authorization or denial of a service for the accession number you have entered.
7. Click the **Search** link to search for a PDC number.

Special Payment Authorization (continued)

FIGURE 2

The screenshot shows the 'Special Pay Auth' form in the GDB-SIS system. The form is titled 'Monitor » Special Pay Auth'. It includes a sidebar with various navigation links. The main form area contains the following fields and controls:

- Client Information:**
 - *Accession Number: 170 - 31 - 139 / A - 2008 - 12 (with a search icon)
 - Name: AARON
 - Case becomes 24 weeks on: 9/5/2008
 - Gestational Age Today: 38 Weeks 0 Days
 - Show Special Authorization Services (button)
- *PDC Number: (text field with a search icon)
- Authorize All Services: (checkbox) (GC, U/S, Amnio, KARYO, AFAFP) (checkbox) (GC, CVS, K)
- Services: (checkbox) Genetic Counseling (checkbox) Second Opinion Ultrasound (checkbox) Ultrasound (checkbox) AF-AFP/AChE Analysis (checkbox) Amniocentesis (checkbox) Analysis on Amniotic Fluid with Karyotype (checkbox) Fetal Tissue Karyotype (checkbox) Chorionic Villus Sampling (checkbox) Placental Biopsy (checkbox) Karyotype by CVS (checkbox) PUBS (checkbox) Modified Genetic Counseling (checkbox) SLOS Diagnostic Testing
- *Last Name of Requestor: (text field)
- *First Name of Requestor: (text field)
- *Comments: (text area)
- *Authorization Date: (date picker)
- Is this authorization for a second provided service at the same PDC? (checkbox)
- Buttons: Authorize, Deny, Clear, Back

Numbered callouts (8-13) point to specific fields and controls: 8 points to the 'Authorize All Services' checkbox; 9 points to the 'Authorize All 1st Trimester Services' checkbox; 10 points to the 'Services' checkboxes; 11 points to the 'Last Name of Requestor', 'First Name of Requestor', 'Comments', and 'Authorization Date' fields; 12 points to the 'Is this authorization for a second provided service at the same PDC?' checkbox; 13 points to the 'Authorize', 'Deny', 'Clear', and 'Back' buttons.

8. Click the **Authorize All 2nd Trimester Services** checkbox (GC, U/S, Amnio, Karyo, AF-AFP) to select all of the following services: Genetic Counseling, Ultrasound, Amniocentesis, Karyotype, AF-AFP/ AChE Analysis to authorize or deny all services.
9. Click the **Authorize All 1st Trimester Services** checkbox (GC, CVS, K) to select all of the following services: Genetic Counseling, Chorionic Villus Sampling, Karyotype by CVS to authorize or deny all services.
10. Click the checkbox next to the individual service(s) you wish to authorize or deny.
11. **Last Name of Requestor, First Name of Requestor, Comments** and **Authorization Date** are required fields.
12. Select this checkbox if the Special Authorization is for a 2nd Authorized service at the same PDC. This results in the creation of a new referral and a new PSR for the specimen.
13. **Buttons:**
 - a. Click the **Authorize** button to authorize the selected services.
 - b. Click the **Deny** button to deny the selected services.
 - c. Click the **Back** button to return to the previous screen.

Special Payment Authorization (continued)

FIGURE 3

History of Special Payment Authorizations

14	Authorized Date	PDC Code	Accession Number	Service	Status	Approved By	Requestor Name	Comments	2nd Svc Auth
	10-15-2008	04a	214-05-062/P -2008-11	Genetic Counseling	Authorize	SIS, A	msc, m	Y	17
	10-15-2008	04a	214-05-062/P -2008-11	Ultrasound	Authorize	SIS, A	msc, m	Y	
	10-15-2008	04a	214-05-062/P -2008-11	Amniocentesis	Authorize	SIS, A	msc, m	Y	
	10-15-2008	04a	214-05-062/P -2008-11	AF-AFP/AChE Analysis	Authorize	SIS, A	msc, m	Y	
	10-15-2008	04a	214-05-062/P -2008-11	Analysis on Amniotic Fluid with Karyotype	Authorize	SIS, A	msc, m	Y	
	10-15-2008	03a	171-35-251/A -2008-21	Ultrasound	Authorize	SIS, A	msc, m	Y	
	10-15-2008	03a	171-35-251/A -2008-21	Amniocentesis	Authorize	SIS, A	msc, m	Y	

msc::001
12/12/2008
00:00:00.000

14. All of the special services that have been authorized and/or denied for the case (specimen plus associated specimens) are displayed in the **History of Special Payment Authorization** grid, which is displayed when you click on the **Show Special Authorization Services** button.
15. The accession numbers for all the specimens which have a special authorization/ or denial is displayed in the grid.
16. Click the “Y” hyperlink in the **Comments** column for a given authorization/denial record to modify the record (Last Name of Requestor, First Name of Requestor, Comments or Authorization Date), or to update the authorization or denial status.
17. If the special authorization is for a 2nd service at the same PDC, then this column is populated with a value ‘Y’.

Note: SIS will not allow you to create two authorization/denial records for a service. Instead, you must use the “Y” link to update the existing record.

Specimen History

Data Intake >> Specimen History

This screen displays a history of all accession numbers related to a client. From this screen, you can unlink an accession number from a client. You will then be able to search for a different client with whom to link to the Accession Number.

In both cases the **Specimen History** screen will be displayed for the current client (not the selected or new client).

GDB-SIS

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Addl Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Data Intake >> Specimen History

Client Name: HWANG, Date of Birth: 11/3/2004

Select	Accession Number	Linked Accession	Collection Date	Interpretation
<input type="radio"/>	316-14-169/21-2004-31	316-14-169/21-2004-31	11/10/2004	

Unlink

1. Client Information.
2. Specimen History data. For PNS, the grid row will be ordered by accession number. For NBS the order is by collection date.
3. Click the radio button next to a Specimen History grid entry and click the **Unlink** button to unlink the Accession Number from the client.
 - a. Clicking the Unlink button again will redirect you to the Client/Case Search screen to search for a client with whom the Accession Number can be linked. Click the Save button on the Client/Case Search screen to link the accession to the new client.
 - b. If you cannot find a client with whom to link the Accession Number, you may create a new client by clicking the New button on the Client/Case Search screen. You will be redirected to the Create/Update Client Profile screen to add a new user.

Supply Search

Monitor >> Supply Search

This screen allows you to search for supply items either by Form Shipment or Assigned Providers. A different search form is displayed depending on which search type is selected.

FIGURE 1

Monitor 122 - Supply Search - Microsoft Internet Explorer provided by Deloitte Consulting

File Edit View Favorites Tools Help

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Monitor >> Supply Search

Search Type: Forms Shipment

Search For Forms Shipment

NBS Collection Facility Code: R391

NBS Collection Facility Name: LOS ALAMITOS MEDICA

City: LOS ALAMITOS

Search Clear

Search Results

Hospital Code	Hospital Name	Range of Forms In Which This Number Was Shipped	Date Sent
R391	LOS ALAMITOS MEDICAL CENTER	19721601 - 19721950	02/24/2005
R391	LOS ALAMITOS MEDICAL CENTER	19534801 - 19535150	11/15/2004
R391	LOS ALAMITOS MEDICAL CENTER	19383901 - 19384250	08/15/2004
R391	LOS ALAMITOS MEDICAL CENTER	19348601 - 19348950	05/15/2004
R391	LOS ALAMITOS MEDICAL CENTER	18963301 - 18963650	03/15/2004
R391	LOS ALAMITOS MEDICAL CENTER	18761601 - 18761850	12/15/2003
R391	LOS ALAMITOS MEDICAL CENTER	18761901 - 18762000	12/15/2003
R391	LOS ALAMITOS MEDICAL CENTER	18634001 - 18634350	09/15/2003
R391	LOS ALAMITOS MEDICAL CENTER	18445601 - 18445700	06/15/2003
R391	LOS ALAMITOS MEDICAL CENTER	18445751 - 18446000	06/15/2003
R391	LOS ALAMITOS MEDICAL CENTER	18239101 - 18239450	03/15/2003

1. A different search form is displayed for “Forms Shipment” and “Assigned Provider,” depending on which **Search Type** is selected.
2. **Search For Forms Shipment** criteria: Click the **Search** link to obtain the **NBS Collection Facility Code**, **NBS Collection Facility Name**, or **City** using the Entity Search screen. Alternatively, you can enter the search criteria into the fields directly.
3. **Buttons:**
 - a. **Search** button initiates a search based on any combination of the entered criteria, including a partial name.
 - b. **Clear** button clears the information from all search criteria fields. The Search Results grid will remain on the screen.
4. **Search Results** grid displays the range of form numbers shipped to the selected facility. Clicking on the header of a Search Results column will sort the data grid by that column.

Tracking Events

Data Intake >> Case Summary (PNS) >> Tracking Events

OR

Data Intake >> Case Summary (NBS) >> Tracking Events

The **Tracking Events** screen is used to view and record actions that have been associated with the case record. Diaried Events can also be viewed from this screen. Diaried Events is a log of all events (including Tracking Events and system generated events) associated with the case. The Tracking and Diaried Events grid can be used to view the history of the case.

The write-up below is for Post go-live specimens, the Pre go-live is explained after the Post go-live as nothing much has changed for Pre go-live specimens.

Tracking Events (continued)

FIGURE 1

GDB-SIS

Data Intake **Entity** **Monitor** **Follow Up Center** **CCC** **Utilities**

Client/Case Search
Id Search
View Client Profile
1st TTRF Data Entry (PNS)
2nd TTRF Data Entry (PNS)
Case Summary (PNS)
View Edit Log
Resolve Duplicates
Maint Client Relation
Audit Data Entry
View List of CCR
Reassign MC
Reassign CF
View Holding Tank Records
Search for 1st T Specimen

Data Intake > Case Summary (PNS) > Tracking Events

Update Case (PNS) Case Notes Link PNS Cases Re-assign CCC Tracking Events
Appointments Services History Enter PSR Link Client to Entity Unlink Specimens
GA Calculator

Client Name: ZEUTZIUS, CHRISTINE Date of Birth: 2/2/1960

Valid Specimens (used for Risk Assessment)

Trimester	Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
1st Trimester	170-83-254/A-2008-22	06/11/2008	Combined Risk Superseded by Integrated Risk	Tell clinician 1st T Combined is superseded by integrated results
2nd Trimester	213-53-065/P-2008-12	07/26/2008	Full Integrated: Screen Positive for T21	Arrange Immediate Referral

Associated Specimens

Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
Tracking Event 1:			
Tracking Event 2:			
Free Text Field:			
PDC Code: Select			

1. Client information is displayed in a read-only format based on the client profile.
2. The **Interpretation** and current **Tracking Status** is displayed for each valid and associated specimen in the case in a read-only format. The **Tracking Status** is based on actions made for a specimen, including tracking events and selected Diaried events. This information is shown per-specimen basis.
3. The desired tracking event can be selected from the dropdown box in the **Tracking Event 1** and **Tracking Event 2** fields. It is necessary to select the specimen for which the Tracking event is being raised before clicking on **Save TE** button.

Only two tracking events can be saved at once. To enter more than two, you must first click the **Save TE** button (see Figure 2) then enter


additional tracking events. A tracking event is not required at all times. If a user wishes to send out a modified mailer, the user may ignore the entry of tracking events and simply enter the contact information fields and press **Generate Mailer** button (see Figure 2).

4. Notes or comments can be entered into the **Free Text Field**. This field is used to add addendum to the confirmation of contact or modified mailer. When the mailer is sent, this text will be added to the mailer.
5. Select from the dropdown boxes for referred locations.

Note: All the PDCs which offer CVS are displayed in the format of "<PDC Legacy Code> - <PDC Name> - <CVS=Yes>", otherwise the PDCs are displayed in the regular format of "<PDC Legacy Code> - <PDC Name>"

Tracking Events (continued)

FIGURE 2

Date of Contact: 08 - 20 - 2008 
 Time of Contact: 0000
 Person Contacted Last Name:
 Person Contacted First Name:
 Phone Number of Person Contacted: - - x
 Coordinator Last Name: Flessel
 Coordinator First Name: Monica
 Coordinator Phone: 877 - 871 - 6467 x

Tracking and Diaried Events :

Event Number	Accession Number	Trimester	Event Name	Date & Time of Transaction	Interpretation Code	Text Added?	Source
201	213-53-065/P -2008-12	2nd Trimester	TRF and lab data merged	08/02/2008 00:00:00	IPOS-D--	No	SIS
210	170-83-254/A -2008-22	1st Trimester	Tracking status changed	08/02/2008 00:00:00	FSUP----	No	SIS
263	170-83-254/A -2008-22	1st Trimester	Risk modified by linked specimen	08/02/2008 00:00:00	FPOSID-I	No	SIS
200	213-53-065/P -2008-12	2nd Trimester	TRF data entered	08/02/2008 00:00:00	IPOS-D--	No	SIS
213	170-83-254/A -2008-22	1st Trimester	Another accession number is linked to this specimen	08/02/2008 00:00:00	FPOSID-I	No	SIS
264	213-53-065/P -2008-12	2nd Trimester	This new specimen is linked to an	08/02/2008 00:00:00	IPOS-D--	No	SIS

6. If a mailer is to be generated or a Tracking event which requires contact information is raised, fill in the contact information.

7. **Buttons:**

- Save TE:** This will update the **Tracking and Diaried Events** grid below.
- Generate Mailer:** This will generate a mailer.
- Back:** This takes you back to the previous screen.
- Clear:** This clears the screen and cancels the entire operation.

8. The Tracking and Diaried Events grid

This grid shows the total list of tracking events raised till date for the case. Some of the new columns added are the "Event number", "Accession Number" and "Trimester".

The columns "Event number", "Accession Number", "Trimester" and "Date & Time of transaction" can be sorted i.e. clicking on any of these columns once, sorts the data in the column in ascending order and clicking again sorts the data in descending order.

Also, clicking on any of the event dates, takes the user to the "Case Summary" screen which displays the information "as-of" the date selected (i.e. the way the case looked on that date).

Tracking Events (continued)

Now, we can look at the PNS Pre go-live and NBS specimens

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> Case Summary (NBS) >> Tracking Events

Update Case (NBS)	Adequacy Status (NBS)	Case Notes	Conf Test Results	Re-assign CCC
Tracking Events	Appointments	Services History	Link Client to Entity	Case Audit Results SCCC
Link NBS Accn Numbers	Counselor Checklist SCCC	CF Carrier Counseling	Unlink Specimens	

Client Name: Contreras, Jesse Date of Birth: 7/5/2007 **1**

Accession Number: 191-53-073/21-2007-72

Overall Interpretation: **2**

Tracking Status: **2**

Tracking Event 1: **3** Referred to CFC

Tracking Event 2: **3**

Free Text Field: **4**

Metabolic Center Referred: Select

CF Center Referred: Select

SCCC Referred: Select

SCCC Service Code Number:

1. Client information is displayed in a read-only format based on the client profile.
2. The **Overall Interpretation** and current **Tracking Status** are displayed in a read-only format. **Tracking Status** is based on actions made for a case, including tracking events and selected Diaried events.
3. The desired tracking event can be selected from the dropdown box in the **Tracking Event 1** and **Tracking Event 2** fields. Only two tracking events can be saved at once. To enter more than two, you must first click the **Save TE** button (see Figure 2) then enter additional tracking events. A tracking event is not required at all times. If a user wishes to send out a modified mailer, the user may ignore the entry of tracking events and simply enter the contact information fields and press **Generate Mailer** button (see Figure 2).
4. Notes or comments can be entered into the **Free Text Field**. This field is used to add addendum to the confirmation of contact or modified mailer. When the mailer is sent, this text will be added to the mailer.

Tracking Events (continued)

FIGURE 4

Monitoring
MC Annual Patient Summary
CFC Annual Patient Summary
View CFF File Records

Date of Contact: 08/20/2008
 Time of Contact: 1148
 Person Contacted Last Name:
 Person Contacted First Name:
 Phone Number of Person Contacted: - x
 Coordinator Last Name: Bishop
 Coordinator First Name: Tracey
 Coordinator Phone: 626-564-3322 x

Save TE Generate Mailer Back Clear

Tracking and Diaried Events :

Event Number	Event Name	Date & Time of Transaction	Text Added?	Source
212	Specialty Follow-up Center Services Report is entered	09/28/2007 14:05:07	No	jfranco1
239	Confirmatory test results entered	09/05/2007 15:12:06	No	slessing
210	Tracking status changed	08/29/2007 14:02:37	No	APankey
192	Referred to CF Center	08/29/2007 14:02:37	Yes	APankey
210	Tracking status changed	08/29/2007 14:02:37	No	APankey
190	Clinician notified of CF result	08/29/2007 14:02:37	Yes	APankey
202	Result mailer mailed	07/11/2007 22:54:52	No	SIS

TBishop::N094
08/20/2008
11:48:06.533

5. If a mailer is to be generated or a Tracking event which requires contact information is raised, fill in the contact information.
6. **Buttons:**
 - a. **Save TE:** Updates the **Tracking and Diaried Events** grid below.
 - b. **Generate Mailer:** Generates a mailer.
 - c. **Back:** Takes you back to the previous screen.
 - d. **Clear:** Clears the screen and cancels the entire operation.
7. The "Tracking and Diaried Events" grid
 The columns "Event number" and "Date & Time of transaction" can be sorted i.e. clicking on any of these columns once, sorts the data in the column in ascending order and clicking again sorts the data in descending order.

 Also, clicking on any of the event dates, takes the user to the "Case Summary" screen which displays the information "as-of" the date selected (i.e. how the case looked on that date).

Note:

- The above screenshot shows tracking events for a CF case. There are many other tracking events for each NBS disorder. These are listed in the dropdown box.
- For PNS specimens all the PDCs which offer CVS are displayed in the format of "<PDC Legacy Code> - <PDC Name> - <CVS=Yes>", otherwise the PDCs are displayed in the regular format of "<PDC Legacy Code> - <PDC Name>".
- The same list of tracking events is displayed for Post go-live and Pre go-live PNS specimen

TRF Data Entry (NBS)

Data Intake >> TRF Data Entry (NBS)

This screen is used to enter Test Request Form (TRF) data via manual keyed data entry for newborn screening tests. Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS; if you enter data in these fields you will be required to reenter the information and save again.

FIGURE 1

The screenshot shows the 'Data Intake >> TRF Data Entry (NBS)' screen. The sidebar on the left contains links such as 'Client/Case Search', 'View Client Profile', 'Specimen History', 'TRF Data Entry (PNS)', 'Case Summary (PNS)', 'Update Case (PNS)', 'TRF Data Entry (NBS)', 'Case Summary (NBS)', 'Update Case (NBS)', 'Lab Conf', 'View Edit Log', 'Resolve Duplicates', 'Maint Client Relation', 'Upload CCR', 'Add Test Results', 'Audit Data Entry', 'Expected Recall (NBS)', 'View List of CCR', and 'NBS DC'. The top menu bar includes 'Data Intake', 'Entity', 'Monitor', 'Follow Up Center', 'CCC', and 'Utilities'. The main content area is titled 'Data Intake >> TRF Data Entry (NBS)'. It contains the following fields:

- *Accession Number: (1) 123 -27 -121 /21 -2003 -21
- #Form Number: (2) 1234567802
- Newborn**
 - *Last Name: (3) James
 - First Name: Nancy
 - Multiple (A,B,C):
 - Address (Street, Number): 123 L Street
 - Address (Apt /Suite #):
 - City: Sacramento
 - State: California
 - Zip: 95623
- Mother**
 - *Mother's Last Name: (4) James
 - Mother's First Name: Amy
 - Mother's Middle Initial:
 - Mother's Maiden Name:
 - Social Security Number: 123 -45 -6789
 - Phone Number: 916 -343 -3434 Ext. :
 - Mother's Birth Date: 05 -23 -1980

1. **Accession Number** is a required field.
2. **Form Number** is a double entry field.
3. Newborn Information - **Last Name** is a required field.

or

4. Mother's Information – **Mother's Last Name** is a required field.

(The **Mother's Last Name** or Newborn's **Last Name** must be entered. Both are not required.)

TRF Data Entry (NBS) - (continued)

FIGURE 2

5 Newborn's Physician

Physician's Last Name: SHELL

Physician's First Name: SHIRLEY

Physician's Address (Number, Street): 101 SOUTH ST.

Physician's Address (Apt / Suite #):

Physician's City: SACRAMENTO

Physician's State: California

Physician's Zip: 91644

Physician's Telephone Number: 916 - 756 - 4444 Ext. :

License Number of Physician:

6 Other Information

Type of Feeding Since Birth: Breast only

Specify, if other selected:

Ethnicity / Race:

☐ White ☒ Hispanic ☐ Black

☐ Chinese ☐ Japanese ☐ Korean

☐ Cambodian ☐ Laos ☐ Vietnamese

☐ Filipino ☐ Other Southeast Asian ☐ Native American

☐ Middle Eastern ☐ Asian East Indian ☐ Hawaiian

☐ Guamanian ☐ Samoan ☐ Unknown

☐ Other (specify)

Specify, if other selected:

5. **Newborn's Physician** Information.

6. **Other Information.** **Ethnicity / Race** check boxes – Multiple checks are allowed. You must uncheck a box to de-select it.

TRF Data Entry (NBS) - (continued)

FIGURE 3

6

Is the Person English Speaking: Yes

Primary Language: Select

If not Spanish then Primary Language:

Medi-Cal Number:

Specimen Collection Information

7

Gender of Newborn: Female

Weight of Newborn: grams 3200

#Date of Birth of Newborn: 01 -16 -2003

#Birth Hour: 0200

#Date of Specimen: 01 -16 -2003

#Hour when specimen was taken: 0400

#Type of Specimen: Heelstick

Specify if other was selected above:

Initials of the Specimen Collector:

Reason for Test - If collected at < 12 hours of age: Select

If Other, Specify:

#RBC Transfusion before Collection: No

#If Yes, Date of Last Transfusion:

#If Yes, Time of Last Transfusion:

Reason For Test: Initial Specimen

If Other Selected Above, Then Specify:

Medical Record Number:

- 7. Specimen Collection Information** - Double entry is required for:
- Date of Birth of Newborn.
 - Birth Hour (24 hour military format 0000-2359)
 - Date of Specimen.
 - Hour when specimen was taken (24 hour military format 0000-2359).
 - Type of Specimen.
 - RBC Transfusion before Collection.
 - If Yes, Date of Last Transfusion.
 - If Yes, Time of Last Transfusion.

TRF Data Entry (NBS) - (continued)

FIGURE 4

4092::msc
01/18/2003
00:00:00.000

7

Hospital Code:
Facility Drawing Specimen:
Nursery Type:
If Other, Specify:
*Adequacy Status: 8
Comments:

Regular Nursery
Adequate Specimen

9

Save Cancel Edit

8. **Adequacy Status** is a required field. The adequacy of the entire specimen may be entered. To change the adequacy of an individual analyte the Change Adequacy Status screen may be used.
9. **Buttons:**
 - a. **Save** – Saves the TRF data only after the reentry of double entry fields is successful.
 - b. **Cancel** – Clears all TRF data entry fields.
 - c. **Edit** – Allows editing of data after initial save, as long as you remain on this screen. Once you navigate away from the screen, or begin entering data for another TRF, you will no longer be able to access and edit previous records. (Note: not required to enter double entry fields when editing).
 - To access previously entered TRFs, use the Audit Data Entry screen to make changes to saved data. This type of data entry is only allowed on the same business day the TRF is entered before the 8:00PM cutoff.

1ST T TRF Data Entry (PNS)

Data Intake >> 1st T TRF Data Entry (PNS)

This screen is used to enter 1st Trimester TRF data for prenatal screening tests. Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS, if you enter data in these fields, you will be required to re-enter the information and save again to permanently save the data.

FIGURE 1

Client/Case Search
Id Search
View Client Profile
1st T TRF Data Entry (PNS)
2nd T TRF Data Entry (PNS)
Case Summary (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Lab Cofc
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Biotinidase Expected List
Expected Recall (NBS)
View List of CCR
Case Resolution
MPKU Registry Search
Metabolic Service Report
Reassign MC
Cystic Fibrosis Service Report
Reassign CF
MS/MS Ref Lab Exptd
Enter Other Mutation Test Results
View Holding Tank Records
Expected Phe Monitoring

Data Intake >> 1st T TRF Data Entry(PNS)

Save

*Accession No: 1

*Form No:

Patient Information

*#Last Name: 2

First Name:

Maiden Name:

Address (Number, Street):

Address (Apt./Suite No):

City:

State: California

ZIP Code:

Birth Date:

Social Security No:

Medical Record No:

Phone No:

Race/Ethnicity Code: 3

Race / Ethnicity:

☐ White - WH ☐ Native American - NA ☐ Japanese - JA ☐ Samoan - SA ☐ Cambodian - CA ☐ Middle Eastern - ME ☐ Other - OT

☐ Black - BL ☐ Hawaiian - HA ☐ Korean - KO ☐ Filipino - FI ☐ Laos - LA ☐ Indian Subcont. - AI ☐ Unknown - UN

☐ Hispanic/Latina - HI ☐ Chinese - CH ☐ Guamanian - GU ☐ Vietnamese - VI ☐ Other SE Asian - SE

1. **Accession Number and Form Number** are required fields.
2. **Patient Information:**
 - a. **Last Name** is a required field.
 - b. **Birth Date** is a double-entry field.

TRF Data Entry (PNS) - (continued)

3. **Race/Ethnicity** Code and check boxes:
 - a. Code is entry field and you can enter the race/ethnicities by code (two characters) in the comma delimited format with no space. The entered values will be selected in the checkbox.
 - b. Multiple checks are allowed. You must uncheck a box to de-select it or remove the code from entry field.

FIGURE 2

MC Annual Patient Summary
CFC Annual Patient Summary
View CFF File Records
Search for 1st T Specimen

Billing Information ④

Medi-Cal No:

PNS Billing Code:

Clinician to be notified of patient's results ⑤

License No(MD, RN, PA,):

NPI No:

Last Name:

First Name:

Facility:

Address (Number, Street):

Address (Apt /Suite No):

City:

State:

ZIP Code:

Phone No: - - x

Fax No: - -

Pregnancy Dating ⑥

#Ultrasound Date: - -

#Gestational Age: (weeks)
(and days)

(decimal weeks)

#LMP: - -

#Physical Exam Date: - -

#Uterine size in weeks:

4. **Billing Information:** Enter billing information and billing code.
5. **Clinician to be notified of patient's results:** Fill in all areas.

TRF Data Entry (PNS) - (continued)

6. Pregnancy Dating:

- a. **Ultrasound** – Date Performed and Gestational Age on that date are double-entry fields.
- b. **LMP** – First day of the last menstrual period is a double-entry field.
- c. **Physical Exam** – Date of most recent exam is a double-entry field.

FIGURE 3

Other Information 7

#Number of fetuses:

#Weight: (in lbs)

#Weight: (in kilos)

Insulin Dependent Diabetic?

Ovum Donor?

Age of Ovum Donor:

*Does patient smoke? 8

NT Information 9

#NT Practitioner Cred No:

NT Supervisor Cred No:

#NT Site Code:

#NT Exam date:

#CRL, Fetus A:

#NT, Fetus A:

Twin pregnancy?:

Chorionicity:

CRL, Fetus B:

CRL Unable to Measure:

NT, Fetus B:

NT Unable to Measure:

Consent Information 10

Patient Consent for External Research?

Specimen Details 11

#Blood collection date:

Facility:

Collector's Initials:

Phone No:

*Adequacy Status: 12

Save Cancel Edit

msc::001
06/02/2009
00:10:00.000

7. Other Information:

- a. **Number of fetuses in this pregnancy** is a double-entry field.
- b. **Patient's most recent weight** is a double-entry field.

TRF Data Entry (PNS) - (continued)

8. **Smoking information is mandatory.**
 - a. Select “Yes”, “No”, or “Not Provided” in the dropdown for the field **Does the patient currently smoke cigarettes?**
9. **NT Information:**
 - a. **NT Practitioner Cred No** is a double-entry field.
 - b. **NT Site Code** is a double-entry field.
 - c. **NT Exam date** is a double-entry field.
 - d. **CRL, Fetus A** is a double-entry field.
 - e. **NT, Fetus A** is a double-entry field.
 - f. **Twin pregnancy** is a drop down control and if you select “Yes” then **Chorionicity** and **Fetus details** will be enabled.
10. **Consent Information:** Select **Patient Consent for External Research?**

You can select “Yes”, “No”, or “Not Provided” in the dropdown.
11. **Specimen Details:**
 - a. **Blood specimen collected on** is a double-entry field.
 - b. **Adequacy Status** is a required field.
12. **Buttons:**
 - a. **Save:** Initial save button click will enable the double entry fields and if any warning messages then it will be displayed on the corresponding control. TRF data is stored after the re-entry of double-entry fields.
 - b. **Cancel:** Clears all TRF data entry fields.
 - c. **Edit:** Allows editing of data after initial save, as long as you remain on this screen. Once you navigate away from the screen, or begin entering data for another TRF, you will no longer be able to access and edit previous records.

Note: To access previously entered TRFs, use the Audit Data Entry screen to make changes to saved data.

2nd TRF Data Entry (PNS)

Data Intake >> TRF Data Entry (PNS)

This screen is used to enter 2nd Trimester TRF data for prenatal screening tests. Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS, if you enter data in these fields, you will be required to re-enter the information and save again to permanently save the data.

FIGURE 1

GDB-SIS

Client/Case Search
Id Search
View Client Profile
1st TTRF Data Entry (PNS)
2nd TTRF Data Entry (PNS)
Case Summary (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Lab Info
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Biotinidase Expected List
Expected Recall (NBS)
View List of CCR
Case Resolution
MPKU Registry Search
Metabolic Service Report
Reassign MC
Cystic Fibrosis Service Report
Reassign CF
MS/MS Ref Lab Exptd
Enter Other Mutation Test Results
View Holding Tank Records
Expected Phe Monitoring
MC Annual Patient Summary
CFC Annual Patient Summary
View CFF File Records
Search for 1st T Specimen

Data Intake >> 2nd TTRF Data Entry (PNS)

Form Type: FORM-2A

Save

*Accession No: 1 []-[]-[]/[]-[]

*Form No: []

1st Trimester Information

1st Trimester TRF No: 2 []

Patient Information

*#Last Name: 3 []

First Name: []

Maiden Name: []

Address (Number, Street): []

Address (Apt /Suite No): []

City: []

State: California

ZIP Code: []

Birth Date: []-[]-[]

Social Security No: []-[]-[]

Medical Record No: []

Phone No: []-[]-[]

Race/Ethnicity Code: 4 []

Race / Ethnicity:

☐ White - WH ☐ Native American - NA ☐ Japanese - JA ☐ Samoan - SA ☐ Cambodian - CA ☐ Middle Eastern - ME ☐ Other - OT

☐ Black - BL ☐ Hawaiian - HA ☐ Korean - KO ☐ Filipino - FI ☐ Laos - LA ☐ Indian Subcont. - AI ☐ Unknown - UN

☐ Hispanic/Latina - HI ☐ Chinese - CH ☐ Guamanian - GU ☐ Vietnamese - VI ☐ Other SE Asian - SE

1. **Accession Number** and **Form Number** are required fields.
2. **1st T Form Number** is an optional field.
3. **Patient Information:**
 - a. **Last Name** is a required field.
 - b. **Birth Date** is a double-entry field.

2nd TRF Data Entry (PNS) (continued)

4. **Race/Ethnicity** Code and check boxes:
 - a. Code is entry field and you can enter the race/ethnicities by code (two characters) in the comma delimited format with no space. The entered values will be selected in the checkbox.
 - b. Multiple checks are allowed. You must uncheck a box to de-select it or remove the code from entry field.

MC Annual Patient Summary

CFC Annual Patient Summary

View CFF File Records

Search for 1st T Specimen

Billing Information

Medi-Cal No:

PNS Billing Code:

Clinician to be notified of patient's results

License No(MD, RN, PA,):

NPI No:

Last Name:

First Name:

Facility:

Address (Number, Street):

Address (Apt /Suite No):

City:


State:

ZIP Code:

Phone No: - - x

Fax No: - -

Pregnancy Dating


#Ultrasound Date: - - 


#Gestational Age: (weeks)

(and days)

OR

(decimal weeks) .

#LMP: - - 

#Physical Exam Date: - - 

#Uterine size in weeks:

5. **Billing Information:** Enter billing information and billing code.
6. **Clinician to be notified of patient's results:** Fill in all areas.
7. **Pregnancy Dating:**

2nd TRF Data Entry (PNS)

- a. **Ultrasound** – Date Performed and Gestational Age on that date are double-entry fields.
- b. **LMP** – First day of the last menstrual period is a double-entry field.
- c. **Physical Exam** – Date of most recent exam is a double-entry field.

msc::001
 08/01/2008
 00:01:00.000

Other Information

#Number of fetuses:

#Weight: (in lbs)

#Weight: (in kilos)

Insulin Dependent Diabetic?

Ovum Donor?

Age of Ovum Donor:

* Does patient smoke?

NT Information

#NT Practitioner Cred No:

NT Supervisor Cred No:

#NT Site Code:

#NT Exam date:

#CRL, Fetus A:

#NT, Fetus A:

Twin pregnancy?:

Chorionicity:

CRL, Fetus B:

CRL Unable to Measure:

NT, Fetus B:

NT Unable to Measure:

Consent Information

Patient Consent for External Research?

Specimen Details

#Blood collection date:

Facility:

Collector's Initials:

Phone No:

* Adequacy Status:

8. Other Information:

- a. **Number of fetuses in this pregnancy** is a double-entry field.
- b. **Patient's most recent weight** is a double-entry field.

9. Smoking information is mandatory.

- b. Select “Yes”, “No”, or “Not Provided” in the dropdown for the field **does the patient currently smoke cigarettes?**

2nd TRF Data Entry (PNS) (continued)

10. **NT Information:**
 - a. **NT Practitioner Cred No** is a double-entry field.
 - b. **NT Site Code** is a double-entry field.
 - c. **NT Exam date** is a double-entry field.
 - d. **CRL, Fetus A** is a double-entry field.
 - e. **NT, Fetus A** is a double-entry field.
 - f. **Twin pregnancy** is a drop down control and if you select “Yes” then **Chorionicity** and **Fetus details** will be enabled.
 11. **Consent Information:** Select **Patient Consent for External Research?**
You can select “Yes”, “No”, or “Not Provided” in the dropdown.
 12. **Specimen Details:**
 - a. **Blood specimen collected on** is a double-entry field.
 - b. **Adequacy Status** is a required field.
 13. **Buttons:**
 - a. **Save:** Initial save button click will enable the double entry fields and any warning messages will be displayed on the corresponding control. TRF data is stored after the re-entry of double-entry fields.
 - b. **Cancel:** Clears all TRF data entry fields.
 - c. **Edit:** Allows editing of data after initial save, as long as you remain on this screen. Once you navigate away from the screen, or begin entering data for another TRF, you will no longer be able to access and edit previous records.
- Note:** To access previously entered TRFs, use the Audit Data Entry screen to make changes to saved data.

Unlink Specimens

Data Intake >> Case Summary (PNS) >> Unlink Specimens

This screen displays a history of all accession numbers related to a client for Pre PEII, NBS and displays a history of all accession numbers related to case for Post PEII. From this screen, you can unlink an accession number from a client. You will then be able to search for a different client with whom to link to the Accession Number.

This screen was named as 'Specimen History' before (Pre PEII) and now (Post PEII) it will be named as 'Unlink Specimens'.

In both cases the **Unlink Specimens** screen will be displayed for the current client (not the selected or new client).

Client/Case Search
Id Search
View Client Profile
1st T TRF Data Entry (PNS)
2nd T TRF Data Entry (PNS)
Case Summary (PNS)
View Edit Log
Resolve Duplicates
Maint Client Relation
Audit Data Entry
View List of CCR
Reassign MC
Reassign CF
View Holding Tank Records
Search for 1st T Specimen

Data Intake >> Case Summary (PNS) >> Unlink Specimens

Update Case (PNS) Case Notes Link PNS Cases Re-assign CCC Tracking Events
Appointments Services History Enter PSR Link Client to Entity Unlink Specimens (4)

GA Calculator

Client Name: Antony, Helga Date of Birth: 9/12/1986 (1)

	Accession Number	BCD	Risk Assessment Interpretation
(2) <input type="radio"/>	170-19-913/A-2008-22	06/15/2008	Specimen used for Integrated Risk
<input type="radio"/>	213-32-058/P-2008-32	07/29/2008	Full Integrated: Screen Negative

Unlink (3)

mflessel::51
07/26/2008
00:00:00.000

1. Client Information.
2. Specimen History data. For NBS and Pre PEII 'Linked Accession' column will be displayed in the specimen history grid. For PNS, the grid row will be ordered by accession number. For NBS the order is by collection date.
3. Click the radio button next to a Specimen History grid entry and click the Unlink button to unlink the Accession Number from the client.
 - a. Clicking the Unlink button again will redirect you to the Client/Case Search screen to search for a client with whom the Accession Number can be linked. Click the Save button on the Client/Case Search screen to link the accession to the new client.

Unlink Specimens (continued)

- b. If you cannot find a client with whom to link the Accession Number, you may create a new client by clicking the 'New' button on the Client/Case Search screen. You will be redirected to the Create/Update Client Profile screen to add a new user.
4. Unlink Specimens link will display as third level menu because now it loads information for a case.

Update Address

Data Intake >> View Client Profile >> Update Address

This screen allows a user to view address history and add a new address to a client's profile. Existing addresses cannot be updated, in order to retain address history. The most recent address added to SIS will be considered the client's current address.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> View Client Profile >> Update Address

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name NBS DC	Maint Client Relation NBS ND	Resolve Duplicates NBS MR	View Edit Log NBS OH	Add Test Results NBS TR

Client Name: SANCHEZ, DELORES Date of Birth: 8/23/1972

Add Address

Address (Number , Street):

Address (Apt / Suite #):

City:

State:

Zip:

☐ Do not validate address

Address History

Address (Number, Street)	Address (Apt / STE #)	City	State	Zip	Start Date	End Date
23545 S OLIVE AVE		STOCKTON	California	95215	1/3/2005	12/31/9999

1. Enter the client's Address information in the **Add Address** fields. SIS will validate any address entered using address validation software.
 - a. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered. In case of invalid address entry (which can not be corrected by Address Validation software), SIS will not store those details and will display an error message. You can correct details and click save again.
2. **Do not validate address** – Checking the box will deactivate the address validation feature.

Update Address (continued)

FIGURE 2

GDB-SIS

Data Intake » View Client Profile » Update Address

Client Name: SANCHEZ, DELORES Date of Birth: 8/23/1972

Add Address

Address (Number , Street):

Address (Apt / Suite #):

City:

State:

Zip:

☐ Do not validate address

Address History

Address (Number, Street)	Address (Apt / STE #)	City	State	Zip	Start Date	End Date
23545 S OLIVE AVE		STOCKTON	California	95215	1/3/2005	12/31/9999

3. Buttons:

- Save** – saves the record and add a new address record to the Address History grid.
 - Back** – return to the previous screen without saving.
 - Clear** – clears the Add Address fields without saving data.
4. The Previous addresses are displayed in the **Address History** grid, along with their Start Date and End Date. The start date will be automatically populated with the date the new address is added to SIS.
- SIS will automatically populate the End Date for a newly added address with 12/31/9999. When you replace an existing address with a new one, the End Date for the old address will be populated with the date the new address is added to SIS.

Update Case (NBS)

CCC >> Update Case (NBS)

The **Update Case (NBS)** screen allows you to make changes to the information that was originally entered on the Test Request Form. A variety of NBS case data can be updated here, including the transfusion date, specimen collection date, nursery and feeding types, birth weight, and family native language. The specimen's adequacy code and comments relating to the case can also be updated on this screen.

Please note that when updating information from the Client Profile screen, the information will NOT be reflected on the Case Summary (NBS) screen. This is to prevent old case information (i.e. for a previous pregnancy) from being updated. However, if information is updated on the Update Case (NBS) screen, it will be saved to the Client Profile screen.

FIGURE 1

Headline Cases (NBS)

CCC >> Update Case (NBS)

Client Name: SMITH, LINDA Date of Birth: 10/28/2004

Accession Number: 306-78-207/21-2004-31

Form Number: U1931964390

Date/Time of Birth: 10/28/2004 Hours 1733 ①

RBC Transfusion before Collection: No

Date/Time of Last Transfusion: Hours

Date Specimen Collected: 10/29/2004 Hours 0150 ②

Type of Specimen: Other ③

Other Specimen Type:

Initials of Collector: EMH

If collected at < 12 hours of age, Reason? To Be Transfused ④

Specify Other:

3464:nbs001
01/10/2005
17:51:32.560

1. Enter the date and time the baby was born in the **Date/Time of Birth** field. Note that the Hours field is based on a 24-hour military clock.
2. Enter the date and time of the last transfusion if necessary in the **Date/Time of Last Transfusion** field. Note that the Hours field is in 24-hour format. Enter the date and time the specimen was collected in the **Date Specimen Collected** field. Note that the **Hours** field is in 24-hour format.
3. Select the specimen type (or Not Provided or Other Specimen Type) from the **Type of Specimen** dropdown field. If the required specimen type is not listed in the Type of Specimen dropdown field enter a value in the **Other Specimen Type** field.
4. Select the appropriate reason if required in the **If collected at < 12 hours of age, Reason?** field. If the required value is not listed in the dropdown field enter a value in the **Specify Other** field.

Update Case (NBS) - (continued)

FIGURE 2

The screenshot shows the 'Update Case (NBS)' form. On the left is a blue sidebar. The form fields are as follows:

- Reason for Test:** A dropdown menu with 'Initial Specimen' selected. A circled '5' points to this field.
- Specify Other Reason:** A text input field.
- Medical Record Number:** A text input field containing '1231465464'.
- Facility Drawing Specimen:** A text input field.
- Hospital Code:** A text input field.
- Nursery Type:** A dropdown menu with 'NICU' selected. A circled '6' points to this field.
- Other Nursery Type:** A text input field.
- Feeding:** A dropdown menu with 'Other (Specify)' selected. A circled '7' points to this field.
- Specify Other:** A text input field containing 'NPO IV FLUIDS'. A circled '8' points to this field.
- Birth Weight:** A text input field with 'grams' and '3500.00'.
- English Speaking?:** A dropdown menu with 'Select' selected. A circled '9' points to this field.
- If No, Primary Language:** A dropdown menu with 'Select' selected.
- If Other, Specify:** A text input field.
- Medical Number:** A text input field.
- Adequacy Code:** A dropdown menu with 'Adequate Specimen' selected.
- Comment:** A large text area.

At the bottom left are three buttons: 'Save', 'Back', and 'Edit'. A circled '10' points to these buttons.

5. Select the reason for the test in the **Reason for Test** dropdown field. If the required value is not listed in the dropdown field enter a value in the **Specify Other Reason** field.
6. Select the nursery type from the **Nursery Type** dropdown field. If the required value is not listed in the dropdown field enter a value in the **Other Nursery Type** field.
7. Select the feeding method from the **Feeding** dropdown field. If the required value is not listed in the dropdown field enter a value in the **Specify Other** field.
8. Enter the birth weight in grams in the **Birth Weight** field.
9. Select Yes or No in the **English Speaking?** dropdown field. Select a value for the primary language in the **If No, Primary Language** field if the family does not speak English. If the family's primary language is not listed in the dropdown, enter the primary language in the **If Other, Specify** field.
10. **Buttons:**
 - a. **Save** – Saves changes to the record.
 - b. **Back** – Returns to the case summary (NBS) screen.
 - c. **Edit** – After clicking Save, validations are performed and some fields will be displayed as read-only. You may change fields that are not grayed out or click the **Edit** button to edit other fields as well. Click the save button again to save the data.

Update Case (PNS)

Data Intake >> Case Summary (PNS) >> Update Case (PNS)

The new PEII Update Case screen is divided into two tabs i.e. "Interpretation Factors" and "Interpretation and Results". Navigation between these two tabs will retain the data. Screen will be loaded with master data and NT information by default with ISI messages related to the case. User can select max 3 specimens from Valid and Associated grid to edit specimen specific interpretation factors. Original TRF data columns are populated according to the selected specimens from Valid and Associated grid. Information received from multiple TRFs can be viewed and corresponding master or specimen specific factors can be updated. Case notes can be added by clicking case notes hyper link "Yes/No" in valid and associated grid.

FIGURE 1

Valid Specimens (used for Risk Assessment)

	Trimester	Accession Number	TRF Number	BCD	Risk Assessment Interpretation	Tracking Status	Case Notes?	Alerts?	CCC Open	HC?
<input type="checkbox"/>	1st Trimester	170-10-246/A - 2008-63	F000000980A	06/16/2008	Combined Risk Superseded by Integrated Risk	Tell clinician 1st T Combined is superseded by integrated results	No	No	52	Yes
<input type="checkbox"/>	2nd Trimester	210-70-104/P - 2008-11	S000004282L	07/26/2008	Full Integrated: Screen Negative	Case/Specimen Closed	No	No	52	No

Associated Specimens

	Accession Number	TRF Number	BCD	Risk Assessment Interpretation	Tracking Status	Case Notes?	Alerts?	CCC Open	HC?
<input type="checkbox"/>	213-77-057/P - 2008-71	S000004852L	07/30/2008	2nd T: Unexpected Specimen	Specimen Closed - Unexpected Specimen, Results Invalid	No	No	52	No

[View Selected Specimens](#)

Screen is divided into two tabs, 1 and 2 (Figure 1) are the tab links with which user can navigate each of them.

1. **Interpretation Factors tab** will display all interpretation factors for selected specimens, master data, and NT information along with original TRF data.
2. **Interpretation and Results tab** will display gestational age changes, old and new interpretation and risks, old and new MoM details and old and new adjusted MoM details after reinterpretation. Also has provision to enter case notes and associate it to one or more specimens in the case
3. **Valid Specimens (Used for Risk Assessment)** section will display valid specimen in a case which are used for risk assessment with trimester, accession number, TRF form number, blood collection date, interpretation, tracking status, case notes, alerts, headline case and assigned CCC details.

Update Case (PNS) - (continued)

4. **Associated Specimens** section will display associated specimen details with trimester, accession number, TRF form number, blood collection date, interpretation, tracking status, case notes, alerts, headline case and assigned CCC details.
5. **View Selected Specimen** button click will populate interpretation factors and original TRF data for selected specimens from valid (3) and associated (4) grid.

FIGURE 2

Monitoring
 MC Annual Patient Summary
 CFC Annual Patient Summary
 View CFF File Records
 Search for 1st T Specimen

Specimen Specific Interpretation Factors			
Accn Number	170-10-246/A -2008-63	210-70-104/P -2008-11	213-77-057/P -2008-71
Interpretation	Combined Risk Superseded by Integrated Risk	Full Integrated: Screen Negative	2nd T: Unexpected Specimen
View TRF	View	View	View
Form Number	<input type="checkbox"/> F000000980A	<input type="checkbox"/> S000004282L	<input type="checkbox"/> S000004852L
Adequacy Code	<input type="checkbox"/> A	<input type="checkbox"/> A	<input type="checkbox"/> A
Blood Collection Date	<input type="checkbox"/> 06 -16 -2008	<input type="checkbox"/> 07 -26 -2008	<input type="checkbox"/> 07 -30 -2008
Patient Weight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lbs	<input type="checkbox"/> 152	<input type="checkbox"/> 152	<input type="checkbox"/> 152
Kilos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Had CVS?	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No
Patient Smokes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Medi Cal #	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical Record #	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6

6. **Specimen Specific Interpretation factors** data can be confirmed and updated here. These sections are populated on view selected specimen button (5) click according to the selected specimens.

Update Case (PNS) - (continued)

FIGURE 3

7

8

Case-wide Interpretation Factors				
Master Data	Master Data	Original TRF Data	Original TRF Data	Original TRF Data
Accn Number		170-10-246/A - 2008-63	210-70-104/P - 2008-11	213-77-057/P - 2008-71
Date of Birth	<input type="checkbox"/> 06 - 04 - 1963	6/4/1963	6/4/1963	6/4/1963
Age at Term	45.56 Years			
Ovum Donor?	<input type="checkbox"/> Select			
Ovum Donor Age at Donation	<input type="checkbox"/> <input type="text"/>			
Race/Ethnicity	<input type="checkbox"/>			
Race1	Black	Black	Black	Black
Race2	Other Southeast Asian	Other Southeast Asian	Other Southeast Asian	Other Southeast Asian
Race3	Select			
Race4	Select			
Insulin Dependent Diabetic	<input type="checkbox"/> No	No	No	No

Dating Method Selected	<input type="checkbox"/> NT CRL	NT CRL	Physical Exam	NT CRL
GA at collection by NT CRL		12 Weeks 5 Days	18 Weeks 3 Days	19 Weeks 0 Day
PDC U/S Date	<input type="checkbox"/> <input type="text"/> - <input type="text"/> - <input type="text"/>			
PDC U/S GA	<input type="checkbox"/>			
Weeks	<input type="text"/>			
Days	<input type="text"/>			
Decimal	<input type="text"/>			
PDC U/S GA at collection				
U/S Date	<input type="checkbox"/> <input type="text"/> - <input type="text"/> - <input type="text"/>			
U/S GA	<input type="checkbox"/>			
Weeks	<input type="text"/>			
Days	<input type="text"/>			
Decimal	<input type="text"/>			
U/S GA at collection				
LMP Date	<input type="checkbox"/> <input type="text"/> - <input type="text"/> - <input type="text"/>			
LMP GA at collection				
Physical Exam Date	<input type="checkbox"/> 07 - 17 - 2008		7/17/2008	
PE GA Weeks	<input type="checkbox"/> 14		14	
PE GA at collection		9 Weeks 4 Days	15 Weeks 2 Days	15 Weeks 6 Days
Number of Fetuses	<input type="checkbox"/> 1	1	1	1
Fetal Reduction?	<input type="checkbox"/> Select			
Fetal Demise > 8 weeks?	<input type="checkbox"/> Select			
SSN		620-80-0503	620-80-0503	620-80-0503
Alternate DOB	<input type="checkbox"/> <input type="text"/> - <input type="text"/> - <input type="text"/>			

Update Case (PNS) - (continued)

7. **Master Data or Case Wide Interpretation Factors** can be confirmed and updated here. Master data includes race and ethnicity, GA details, selected dating method, fetus details and ovum donor details etc.
8. **Original TRF data** section will display original TRF information is collected at the time of TRF entry. This data will not be updated even if the corresponding master data field is modified.

FIGURE 4

9

msc: :001
 12/12/2008
 00:00:00.000

NT Information				
NT information entered by NT practitioner?	<input type="checkbox"/> No			
NT information updated by coordinator?	<input type="checkbox"/> No			
NT Site Code	<input type="checkbox"/> <input style="width: 100px;" type="text"/>			
NT Site Name	<input type="checkbox"/> <input style="width: 100px;" type="text"/>			
NT Practitioner Name	<input style="width: 100px;" type="text" value="Goldman, Sara"/>	Goldman, Sara		
NT Practitioner Phone	<input style="width: 30px;" type="text" value="510"/> <input style="width: 30px;" type="text" value="-412"/> <input style="width: 30px;" type="text" value="-1463"/>			
NT Practitioner Credential #	<input style="width: 100px;" type="text" value="P01003"/>	P01003		
NT Supervisor Credential #	<input style="width: 100px;" type="text"/>			
NT Exam Date	<input style="width: 30px;" type="text" value="06"/> <input style="width: 30px;" type="text" value="-13"/> <input style="width: 30px;" type="text" value="-2008"/> <input style="width: 30px;" type="text" value="6:30"/>	6/13/2008		
CRL GA on NT Exam Date	<input style="width: 100px;" type="text" value="12 Weeks 2 Days"/>	12 Weeks 2 Days		
Twins by NT Ultrasound?	<input type="checkbox"/> <input style="width: 50px;" type="text" value="No"/>	No		
Chorionicity?	<input type="checkbox"/> <input style="width: 50px;" type="text" value="Select"/>			
Fetus A:				
NT CRL (mm)	<input type="checkbox"/> <input style="width: 100px;" type="text" value="57"/>	57.0		
NT Measurement (mm)	<input type="checkbox"/> <input style="width: 100px;" type="text" value="1"/>	1.0		
Fetus B:				
NT CRL (mm)	<input type="checkbox"/> <input style="width: 100px;" type="text"/>			
NT measurement (mm)	<input type="checkbox"/> <input style="width: 100px;" type="text"/>			

9. **NT Information** section displays the master NT details as well as original NT information came on TRF for the selected specimens. Master NT information can be confirmed and updated here. Though it is titled as master NT information, the display depends on what NT information the case has. If master NT information is entered by NT practitioner then CCC confirmation check boxes are pre populated.

Update Case (PNS) - (continued)

FIGURE 5

TRF Data Entry (NBS)

Case Summary (NBS)

Lab CoFC

View Edit Log

Resolve Duplicates

Maint Client Relation

Upload CCR

Add Test Results

Audit Data Entry

Biotinidase Expected List

Expected Recall (NBS)

View List of CCR

Case Resolution

MPKU Registry Search

Metabolic Service Report

Reassign MC

Interpretation Factors

Interpretations and Results 10

Gestational Age Changes: 11

Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
Old Interpretation	Specimen used for Integrated Risk	Serum Integrated: Screen Positive for NTD
Old GA @ Collection	11 Weeks 1 Day	16 Weeks 6 Days
New GA @ Collection	12 Weeks 1 Day	17 Weeks 6 Days

Old GA today 37 Weeks 2 Days

New GA today 38 Weeks 2 Days

Old date @ 24 weeks 09/18/2008

New date @ 24 weeks 09/11/2008

Days difference 7 Days

12

10. The **Interpretation and Results** tab displays the old and new interpretation & results before and after changes have been made. This tab displays information for all the specimens irrespective of the specimens selected on the first tab.
11. Old and new gestational age changes are displayed for all the specimens.
12. Old and new gestational age today, 24 weeks and day's difference for the pregnancy as a whole are displayed.

FIGURE 6

Cystic Fibrosis Service Report

Reassign CF

MS/MS Ref Lab Exptd

Enter Other Mutation Test Results

View Holding Tank Records

Expected Phe Monitoring

MC Annual Patient Summary

CFC Annual Patient Summary

View CFF File Records

Search for 1st T Specimen

13

INTERPRETATION:

Old Interpretation

Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
Interpretation	Specimen used for Integrated Risk	Serum Integrated: Screen Positive for NTD
T21 Risk		1 in 100000
Ovum Donor T21 Risk		
T18 Risk		1 in 46000
Ovum Donor T18 Risk		
SLOS/SCD Risk		1 in 10000
NTD Risk		AFP MoM 3.00

14


New Interpretation

Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
Interpretation	Specimen used for Integrated Risk	Serum Integrated: Screen Positive for NTD
T21 Risk		1 in 2800
Ovum Donor T21 Risk		
T18 Risk		1 in 100000
Ovum Donor T18 Risk		
SLOS/SCD Risk		1 in 10000
NTD Risk		AFP MoM 2.60

13. Old interpretation and numeric risks for all specimens are displayed in this grid.
14. New interpretation and numeric risks for all specimens are displayed in this grid.

Update Case (PNS) - (continued)

FIGURE 7



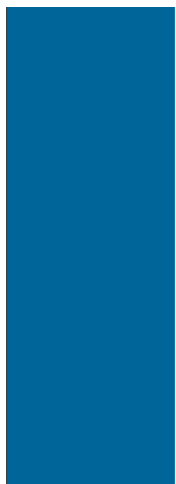
15

TEST RESULT VALUES AND FINAL MoMs:

Analytic Values		
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
HCG1	72.76 IU/mL	72.76 IU/mL
PAPP-A	1.93 µU/mL	1.93 µU/mL
AFP		122.75 ng/mL
HCG		29.77 IU/mL
UE3		1.19 ng/mL
INH		720.31 pg/mL

15. Test result values as processed by the labs are displayed for all specimens in the case.

FIGURE 8



16

Old MoMs		
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
HCG1 MoM	1.36	1.36
PAPP-A MoM	0.12	0.12
AFP MoM		3.00
HCG MoM		1.81
UE3 MoM		0.84
INH MoM		2.76

17

New MoMs		
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
HCG1 MoM	0.79	0.79
PAPP-A MoM	0.77	0.77
AFP MoM		2.60
HCG MoM		2.09
UE3 MoM		0.66
INH MoM		2.79

16. Old final MoMs are displayed.
17. New final MoMs are displayed.

Update Case (PNS) - (continued)

FIGURE 9

Adjusted MoMs:
[173-91-169/A -2008-31](#)

Old MoM Adjustments

Date	Test	ADQ	Values	Un Adj MoM	Wt. Adj	IDD Adj	Race Adj	Smk Adj	Final MoM
6/22/2008	HCG1	A	72.76 IU/mL	1.75	1.40	1.40	1.40	1.36	1.36
6/22/2008	PAPP-A	A	1.93 μ U/mL	0.12	0.10	0.10	0.10	0.12	0.12

New MoM Adjustments

Date	Test	ADQ	Values	Un Adj MoM	Wt. Adj	IDD Adj	Race Adj	Smk Adj	Final MoM
6/22/2008	HCG1	A	72.76 IU/mL	1.01	0.81	0.81	0.81	0.79	0.79
6/22/2008	PAPP-A	A	1.93 μ U/mL	0.81	0.64	0.64	0.64	0.77	0.77

[216-28-034/P -2008-11](#)

18. Old and new adjusted MoMs are displayed. Each accession number is a hyper link, by clicking this hyper link user can expand or collapse the adjusted MoMs table.

FIGURE 10

Scanned Documents:

Accn Number	InterpCode	Document Identifier	Document Type	Scanned Date
-------------	------------	---------------------	---------------	--------------

Case Notes:

Accession Number	Interpretations
<input type="checkbox"/> 173-91-169/A -2008-31	Specimen used for Integrated Risk
<input type="checkbox"/> 216-28-034/P -2008-11	Serum Integrated: Screen Positive for NTD

Case Notes Text Box

Buttons: Save, Edit, Back

19. **Scanned documents** grid displays all the scanned documents related to the specimen with accession number, Interp Code, Document Identifier, Document Type and Scanned date details.
20. **Case Notes** grid displayed all the accession number and interpretation details as per old interpretation with select check box to add case notes.
21. **Case Notes Text Box** is an input field to add case notes to selected accession numbers in case notes grid.
22. **Save Button** click saves master data, NT information and all case information details after reinterpretation. This button is enabled only when user clicks on reinterpretation button on 1st tab.
23. **Edit Button** click navigate user back to first tab and user can modify the data and reinterpret the case.
24. **Back Button** click will navigate user back to Case Summary screen.

Update MSMS Review Cases

CCC >> View MSMS Review Cases >> Update MSMS Review Cases

This screen displays all disorders associated with a specimen. The user can change the disorder flag for disease patterns using this screen. This screen is also used to change the overall interpretation for the case.

GDB-SIS

Data Intake Entity Monitor Follow Up Center **CCC** Utilities

CCC >> View MSMS Review Cases >> Update MSMS Review Cases

Headline Cases (PNS)
Headline Cases (NBS)
View MSMS Review Cases

Client Name: Bender, David Date of Birth: 7/8/2004
Accession Number: 195-03-260/21-2004-11

Acylcarnitine Panel

Disorders	Positive	Negative
BKT, 2M3OHBCCDD	<input type="radio"/>	<input checked="" type="radio"/>
GA-I	<input type="radio"/>	<input checked="" type="radio"/>
GA-II, EE	<input type="radio"/>	<input checked="" type="radio"/>
Carnitine Transporter Deficiency	<input type="radio"/>	<input checked="" type="radio"/>
SCADD, IBCDD	<input type="radio"/>	<input checked="" type="radio"/>
MCD	<input type="radio"/>	<input checked="" type="radio"/>
PA/MMA	<input type="radio"/>	<input checked="" type="radio"/>
Malonic Aciduria	<input type="radio"/>	<input checked="" type="radio"/>
CPT-I	<input type="radio"/>	<input checked="" type="radio"/>

Acylcarnitine Interpretation: Review

Amino Acid Panel

Disorders	Positive	Negative
Phenylketonuria	<input type="radio"/>	<input checked="" type="radio"/>
Tyrosinemia	<input type="radio"/>	<input checked="" type="radio"/>
Maple Syrup Urine Disease	<input type="radio"/>	<input checked="" type="radio"/>
Citrullinemia (I/II), ASAL Deficiency	<input type="radio"/>	<input checked="" type="radio"/>
Argininemia	<input type="radio"/>	<input checked="" type="radio"/>
HHH syndrome, Gyrate atrophy, Hyperornithinemia w/ Gyrate atrophy	<input type="radio"/>	<input checked="" type="radio"/>
Nonketotic hyperglycinemia	<input type="radio"/>	<input checked="" type="radio"/>
Hyperprolinemia	<input type="radio"/>	<input checked="" type="radio"/>
5-Oxoprolinemia	<input type="radio"/>	<input checked="" type="radio"/>

Amino Acid Interpretation: Negative

Overall Interpretation: Review

Save Reset Cancel

- Client information is displayed at the top of the screen.
- The **Acylcarnitine Panel** and the **Amino Acid Panel** display the disorder flags, which may be changed.
- The **Interpretations** dropdown fields may also be used to change the overall case interpretation.
- Buttons:**
 - Save** – save the changes to the disorder flags.
 - Reset** – reset the flags to the previous values.
 - Cancel** – cancel changes and return to the previous screen.

Update Name

Data Intake >> View Client Profile >> Update Name

The **Update Name** screen allows you to view the name history of a client, with start and end dates for each name. This screen also provides the ability to add a new name to the history, or update an existing name. The client's most recent name will be considered the current name. This is the only screen in SIS where a client's alias (an alternative, secondary name for the client) can be entered.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab CofC
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

3589::msc
01/07/2005
11:05:02.923

Data Intake >> View Client Profile >> Update Name

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Add Test Results
NBS DC	NBS NO	NBS MR	NBS OH	NBS TR

Client Name: OLSEN, SARAH Date of Birth: 5/12/1969

Name History ①

Select:	Last Name	First Name	Middle Initial	Type	Start Date	End Date
<input type="radio"/>	OLSEN	SARAH		Primary	01-03-2005	12-31-9999

② Add Modify

1. A history of names assigned to a client in SIS is displayed in the **Name History** grid along with the **Type**, **Start Date** and **End Date**.
2. **Buttons:**
 - a. **Add** – Allows you to create a new name record for the client. A new row will be added to the Name History grid. See **FIGURE 2** for additional details.
 - b. **Modify** – Allows you to modify the selected record, using radio buttons, in the Name History grid. See **FIGURE 3** for additional details.

Update Name (continued)

FIGURE 2

GDB-SIS

Client/Case Search
 View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 Update Case (PNS)
 TRF Data Entry (NBS)
 Case Summary (NBS)
 Update Case (NBS)
 Lab CofC
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Addl Test Results
 Audit Data Entry
 Expected Recall (NBS)
 View List of CCR
 NBS DC

Data Intake >> View Client Profile >> Update Name

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Addl Test Results
NBS DC	NBS ND	NBS MR	NBS OH	NBS TR

Client Name: OLSEN, SARAH Date of Birth: 5/12/1969

Add Name

*Last Name:
 First Name:
 Middle Initial:
 Maiden Name:
 *Type:
 *Start Date:
 End Date:

Name History

Select:	Last Name	First Name	Middle Initial	Type	Start Date	End Date
C	OLSEN	SARAH		Primary	01-03-2005	12-31-9999

3. Enter the client's new name information in the **Add Name** fields. Last Name, Start Date and name Type (Primary or Alias) are required fields. The Start Date cannot be a future date. Even if you specify an End Date, the Primary name is end dated with the max date '12-31-9999' and a message stating the same appears after the name has been added.

- a. When a new name record is added, the End Date of the previous record will be automatically updated to reflect the date the new record is added.
- b. If the starting date of the new record begins on the same date of any date less than the previous Primary name then an error message for 'Overlapping dates' is displayed.

4. Buttons:

- a. **Save** – Saves the new name, creating a new row in the Name History grid.
- b. **Cancel** – Returns you to the previous state of the page, discarding any unsaved data.
- c. **Clear** – Resets the form fields to blank, discarding any unsaved data.

Update Name (continued)

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake >> View Client Profile >> Update Name

Client/Case Search
 View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 Update Case (PNS)
 TRF Data Entry (NBS)
 Case Summary (NBS)
 Update Case (NBS)
 Lab CofC
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Addl Test Results
 Audit Data Entry
 Expected Recall (NBS)
 View List of CCR
 NBS DC

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Addl Test Results
NBS DC	NBS ND	NBS MR	NBS OH	NBS TR

Client Name: OLSEN, SARAH Date of Birth: 5/12/1969

Add Name

*Last Name: OLSEN
 First Name: SARAH
 Middle Initial:
 Maiden Name: ORDONEZ
 *Type: Primary
 *Start Date: 01-03-2005
 End Date: 12-31-9999

Save Cancel Clear

Name History

Select:	Last Name	First Name	Middle Initial	Type	Start Date	End Date
<input checked="" type="radio"/>	OLSEN	SARAH		Primary	01-03-2005	12-31-9999

3589::msc
 01/07/2005
 11:11:25.000

Add Modify

5. Modify the selected client name information in the **Add Name** fields. Last Name, Start Date and name Type (Primary or Alias) are required fields. The Start Date cannot be a future date. If you do not specify an End Date, the field will be auto populated with 12-31-9999.

Update Phone Numbers

Data Intake >> View Client Profile >> Update Phone Nbrs

The **Update Phone Nbrs** screen allows a user to view the phone number history of a client with start and end dates for each phone number. This screen also provides the ability to add a new phone number to the client profile, or update an existing phone number. The client's most recent phone number will be considered the current phone number.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake » View Client Profile » Update Phone Nbrs

Specimen History Case Summary (PNS) Case Summary (NBS) Update Address Update Phone Nbrs
 Update Name Maint Client Relation Resolve Duplicates View Edit Log Addl Test Results
 NBS DC NBS ND NBS MR NBS OH NBS TR

Client Name: SANTA, MONICA Date of Birth: 11/28/1972

Phone History 1

Select	Number Type	Number	Start Date	End Date
<input type="radio"/>	HOME	(408) 741 2031	01-03-2005	12-31-9999

3589::msc
01/06/2005
17:01:52.763

Add Modify 2

1. A history of phone numbers assigned to a client in SIS is displayed in the **Phone History** grid along with the Type, Start Date and End Date
2. **Buttons:**
 - a. **Add** – Allows you to create a new phone number record for the client. A new row will be created in the Phone History grid. See **FIGURE 2** for additional details.
 - b. **Modify** – Allows you to edit the selected existing phone record. Select the record using the radio button in the Select column of the Phone History grid. See **FIGURE 3** for additional details.

Update Phone Numbers (continued)

FIGURE 2

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab Conf
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

Data Intake >> View Client Profile >> Update Phone Nbrs

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Add Test Results
NBS DC	NBS NO	NBS MR	NBS DH	NBS TR

Client Name: OLSEN, SARAH Date of Birth: 5/12/1969

Phone Numbers

*Contact Type: Select
 *Number: []-[]-[] Ext. : []
 *Start Date: []-[]-[]
 End Date: []-[]-[]

Save Cancel Clear

Phone History

Select	Number Type	Number	Start Date	End Date
<input type="radio"/>	HOME	(925) 223 0254	01-03-2005	12-31-9999

Add Modify

3589::msc
01/07/2005
11:02:22.363

3. Enter the new client phone number information in the Phone Number fields. **Contact Type** (Home, Work, Cell, Fax, TTY), **Number** and **Start Date** are required fields. The **Start Date** cannot be a future date. If you do not specify an **End Date**, the field will be auto populated with 12-31-9999.
4. **Buttons:**
 - a. **Save** – Saves the new phone number.
 - b. **Cancel** – Returns you to the previous state of the page, discarding any unsaved data.
 - c. **Clear** – Resets the form fields to blank, discarding any unsaved data.

Update Phone Numbers (continued)

FIGURE 3

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search
View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 Update Case (PNS)
 TRF Data Entry (NBS)
 Case Summary (NBS)
 Update Case (NBS)
 Lab CofC
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Addl Test Results
 Audit Data Entry
 Expected Recall (NBS)
 View List of CCR
 NBS DC

Data Intake >> View Client Profile >> Update Phone Nbrs

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Addl Test Results
NBS DC	NBS ND	NBS MR	NBS OH	NBS TR

Client Name: OLSEN, SARAH Date of Birth: 5/12/1969

Phone Numbers

*Contact Type: HOME

*Number: 925-223-0254 Ext. :

*Start Date: 01-03-2005

End Date: 12-31-9999

Save Cancel Clear

Phone History

Select	Number Type	Number	Start Date	End Date
<input checked="" type="radio"/>	HOME	(925) 223 0254	01-03-2005	12-31-9999

3589::msc
 01/07/2005
 11:03:08.190

Add Modify

5. Modify the selected client phone number information in the **Phone Numbers** fields. Contact Type (Home, Work, Cell, Fax, TTY), Number and Start Date are required fields. If you do not specify an End Date, the field will be auto populated with 12-31-9999.

Update Telephone Area Code

Utilities >> Update Tel Area

This screen allows you to create new and update existing area codes and exchange codes.

GDB-SIS

Utilities >> Update Tel Area

Update Telephone Area Code

* Area Code: 435

Exchange Code:

* Selected Exchange Numbers: 203,205,207,213

* New Area Code: 438

Update Cancel

1. **Area Code** dropdown is a required field. Selecting an area code will display the existing associated exchange codes (see #2).
2. Select one or more exchange codes from the Exchange Code list to update. These exchange codes will be associated with the New Area Code. Hold down the CTRL key to select more than one.
3. Exchange codes selected in the previous step are displayed in the **Selected Exchange Numbers** field.
4. Enter the new area code for the selected exchange codes in the **New Area Code** field.
5. **Buttons:**
 - a. **Update** – will associate the selected exchange codes with the new area code, and reload a blank screen. The new area code will be added to the Area Code dropdown. In this example, the exchange codes 203, 205, 207, and 213, will now be associated with area code 438, and no longer with area code 435.
 - b. **Cancel** – disregards any changes and reloads a blank screen.

Upload CCR (Confidential Case Report)

Data Intake >> Upload CCR

This screen allows you to upload a Confidential Case Report (CCR) file into SIS containing registry information from different sources.

GDB-SIS

Data Intake >> Upload CCR

*Facility Type

☐ Cytogenetic Lab ☒ PDC ☐ Hospital

☐ Vital Statistics ☐ MD ☐ Birth Defects

☐ BDMP ☐ Unknown ☐ Other

If Other, Specify

*Name of Lab: Kaiser--San, Francisco [Search](#)

*Date of Upload: 01-06-2005

*File Path: C:\Documents and Set [Browse...](#)

1 **2** **3**

[Upload](#) [Clear](#)

Client/Case Search
View Client Profile
Specimen History
TRF Data Entry (PNS)
Case Summary (PNS)
Update Case (PNS)
TRF Data Entry (NBS)
Case Summary (NBS)
Update Case (NBS)
Lab Conf
View Edit Log
Resolve Duplicates
Maint Client Relation
Upload CCR
Add Test Results
Audit Data Entry
Expected Recall (NBS)
View List of CCR
NBS DC

3446: : gdb002
01/06/2005
19:18:26.697

1. **Facility Type** is a required field. Select your facility type using the radio buttons.

2. **Required Fields:**

- Name of Lab** is a required field. You can click the **Search** link, which directs you to the Search Entity screen in order to find the lab and select it or you can enter the Name of Lab directly.
- Date of Upload** is a required field.
- File Path** is a required field. When you click the **Browse** button, a "Choose File" popup window will be displayed, allowing you to find and select the file you want to upload, and will insert the filepath into the field.

3. **Buttons:**

- Upload** button will send the file you have selected to the SIS server, where it will be processed by a batch program. You will receive a confirmation in SIS once the file is uploaded.
- Clear** button clears the information from all fields and reloads the screen, discarding any unsaved data.

Upload CFF File

Follow Up Center >> Upload CFF File

This screen allows the user to upload electronic data received from the Cystic Fibrosis Foundation into SIS.

FIGURE 1

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Follow Up Center >> Upload CFF File

*File Path: Browse... 1

Upload to GDB Cancel

msc::001
03/09/2007
00:00:00.000

1. Buttons:

- Browse:** Displays the **Choose File** window. Navigate to the file to be uploaded, click on the file and click the **Open** button to return the path of the file into the **File Path** field.
- Upload to GDB:** Moves the file specified in the **File Path** to the batch server. Although the file has been uploaded to the batch server, the data in the file will not appear in SIS until the next day, as the file still needs to be run through the nightly batch processing in order for SIS to process the data in the file.

Note: In order to be uploaded, the file must be in the data format specified in the *Specifications – CFF File Upload.doc* document.

- Cancel:** Clears the screen without uploading the file.

Upload FMF NT Practitioners

Monitor » Upload FMF NT Practitioners

This screen allows GDSP to upload FMF NT practitioner data files into SIS in an electronic format. The file must be in the same data format as that specified in the Specifications – FMF Practitioner Data Workflow.doc document.

FIGURE 1

1. The file to be uploaded.
2. **Buttons:**
 - c. Upload button to upload the file.
 - d. Cancel button to cancel the upload. It displays the same page as in Figure 1.

Upload NT Practitioner Medians

Monitor » Upload NT Practitioner Medians

This screen allows GDSP to upload NT practitioner median data files into SIS in an electronic format. The file must be in the same data format as that specified in the Specifications - NT Practitioner Median Data Workflow.doc document.

FIGURE 1

1. The file to be uploaded.
2. **Buttons:**
 - e. Upload button to upload the file.
 - f. Cancel button to cancel the upload. It displays the same page as in Figure 1.

Upload Outcome Survey

Monitor >> Upload Outcome Survey

This screen allows you to upload a data file containing Outcome of Pregnancy information for multiple clients in SIS.

Special Pay Auth
Schedule Site Visit
Outcome Survey
Upload Outcome Survey
Search HIPAA
Supply Search
NBS NO
Search NBS Form
NBS MR
NBS OH
NBS TR
Search for Tests
Review Coord Assign
Search Qtrly Report
View Alerts
PSR Inconsistencies
Case Audit Results SCCC
Services History
Code Karyotypes
Case Audit Results MC
Resolve Potential Matches

3446:gdb002
01/06/2005
19:21:50.833

Monitor >> Upload Outcome Survey

* Source: 1 Kaiser - North

* Date Recieved: 1 01/06/2005

* File Path: C:\Program Files\Spybot - Browse... 2 Upload Cancel

1. Required Fields:

- Source** of the outcome survey is a required field, as the file format is different for Kaiser-North and Kaiser-South.
- Date Received** is a required field. You should enter the date you received the electronic file.
- File Path** is a required field. When you click the **Browse** button, a "Choose File" popup window will be displayed, allowing you to find and select the file you want to upload, and will insert the filepath into the field.

2. Buttons:

- Upload** button will send your file and corresponding outcome survey data into SIS for processing at the end of the day. You will receive a confirmation in SIS once the file is uploaded.
- Cancel** button clears the information from all fields and reloads the screen, discarding any unsaved data.

Upload Quarterly Report

Follow Up Center >> Quart Rept-Patients >> Upload Qtrly Report

The **Upload Qtrly Report** screen allows PDCs to upload their quarterly report information from an electronic file. When the file is uploaded a batch validation program will run in the evening to verify the data. You will be able to view the information on the Quarterly Report-Patients screen the following day.

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Follow Up Center >> Quart Rept-Patients >> Upload Qtrly Report

Upload Qtrly Report

* Browse...

Upload to GDB

15711::pdc001
12/06/2004
18:39:08.673

1. Navigation and screen name.
2. File path is a required field denoted by the (*). When you click the **Browse** button a “Choose File” pop-up window will be displayed. This allows you to find and select the file you want to upload and will insert the file path into the field.
3. **Upload to GDB** button will send the file pop-up you have selected using the Browse button to the SIS server where it will be processed by a batch program and uploaded into the database. SIS will reload the screen. You will be able to view the data the next day on the Quarterly Report-Patients screen. Quarterly report data may only be updated once per quarter for each PDC.

Note: The file to be uploaded must be in XML format. Please refer to Appendix H – Quarterly Report XML Format to view the XML template.

View Address

Entity >> Entity Profile >> Address/Phone

The **View Address** screen is used to display addresses for a given entity. From this screen you can select an entity's existing address to edit or create a new address for an entity.

Entity >> Entity Profile >> Address/Phone

Address/Phone Entity Relation Maintain CEU's License Certification
Entity Services Merge Entities Cond for PDC Approval NT Practitioner Data

Entity ID: 11244501 Entity Code: NT002
Entity Name: deb, samrat

Search Results:

Add Address Edit Address

Contact Type	Address	Telecom Information	Program Area	Effective Start Date	Effective End Date	Address Status	Updated By	Updated Date
<input type="radio"/> Physical Location	Address City CA 94538	(510) 233-2322 (Office Phone Number)	PNS	06/30/2008		Active	msc	06/30/2008

Add Address Edit Address


1. Displays information about the entity that is currently selected in a read-only format based on the entity profile.
2. **Search Results** grid. To select an address for editing, click the radio button next to the address you wish to edit.
3. The user can add or edit NT Practitioner phone & address
4. **Buttons:**
 - a. Click the **Edit Address** button to edit the selected address for the entity.
 - b. Click the **Add Address** button to add a new address for the entity.
 - c. As part of **PEII** change, NT Practitioner data is editable only if the login user has "**Allow NT**" special permission. If the special permission is not provided for the user, **Add Address** and **Edit Address** buttons are disabled on the screen for NT Practitioner data.

View Alerts

Monitor >> View Alerts

The **View Alerts** screen offers a central repository for a user to view and update the status of all of the alerts he/she has received. This is the screen that Monitors are brought to by default when they enter SIS. Alerts are used in SIS to communicate various messages about a case. Alerts may be generated automatically by SIS, or triggered by the actions of another end-user. For example, the follow-up center may input information into SIS that requires your attention.

The **View Alerts** screen will be used to view predefined alerts that already exist in SIS. SIS will also allow selected users to set custom alerts. For more details, see the Set Case Alerts screen.

Alerts are indicated by an exclamation point () on the far right side of the Headline Case grid, or at the top of the SIS screen. This screen will display all new alerts for PEI.

View Alerts (continued)

FIGURE 1

Monitor » View Alerts

User: 3589
Center Code: 40
Filter by: All Search
Primary Sort: Select
Secondary Sort: Select
Alert Text:
Alert Status: Select

Save Cancel

Select:	Alert Status	Cancel Alert	Alert Code	Description	Client Name	Unique Identifier	Center Code	Date	Time
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	ANDREA DIAZ	306-45-055/P - 2004-12	40	01/03/2005	21:15:14
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	BRENDA VELAZQUEZ	306-57-046/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	DELORES SANCHEZ	306-66-025/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	KATHY HERNANDEZ	306-28-024/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	SONYA SINGH	306-13-021/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	MARIA SANCHEZ	306-86-011/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	DONNA LEUNG	306-35-036/P - 2004-11	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	MICHELLE PETERSON	306-55-022/P - 2004-11	40	01/03/2005	21:15:12
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	SYLVIA LOPEZ	306-97-019/P - 2004-11	40	01/03/2005	21:15:10

Update

1. **User** field displays your User ID number in a read-only format, based on your log in information.
2. **Center Code** displays your facility's code, based on your log in information.
3. For GDB Registry users, the **Filter By** dropdown allows you to select only certain types of alerts to view; i.e. NTD, Chromosomal Defect, or DC Registry.
4. You may use the **Primary** and **Secondary** sort dropdowns to identify the sort order in which alerts will be displayed in the alerts grid.
5. Click the **Search** button once you have identified your filter or sort criteria to display matching records. If you do not specify any filter criteria, all of your alerts will be displayed.
6. Click a radio button next to an alert in the alerts grid to select it in order to change the Alert Status.
7. Click the **Update** button after you have selected an alert record to update the Alert Status.

View Alerts (continued)

FIGURE 2

Monitor » View Alerts

User: 3589
Center Code: 40
Filter by: All Search
Primary Sort: Select
Secondary Sort: Select
Alert Text: Clinician or patient address is invalid from TRF entry.
Alert Status: Open

Save Cancel

Select:	Alert Status	Cancel Alert	Alert Code	Description	Client Name	Unique Identifier	Center Code	Date	Time
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	ANDREA DIAZ	306-45-055/P - 2004-12	40	01/03/2005	21:15:14
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	BRENDA VELAZQUEZ	306-57-046/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	DELORES SANCHEZ	306-66-025/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	KATHY HERNANDEZ	306-28-024/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	SONYA SINGH	306-13-021/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	MARIA SANCHEZ	306-86-011/P - 2004-12	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	DONNA LEUNG	306-35-036/P - 2004-11	40	01/03/2005	21:15:13
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	MICHELLE PETERSON	306-55-022/P - 2004-11	40	01/03/2005	21:15:12
<input type="radio"/>	New	<input type="checkbox"/>	101	Clinician or patient address is invalid from TRF entry.	SYLVIA LOPEZ	306-97-019/P - 2004-11	40	01/03/2005	21:15:10

Update

8. **Alert Text** box contains text describing the selected alert in read-only format.
9. **Alert Status** displays the current status of a selected alert. To modify the status of a selected alert, select a different value in the dropdown box, then click the **Save** button. The default value for a new alert will be 'New'. If a user clicks on the alert through the View Alerts screen, or if a user updates it, it's status will change to 'Open'. Users may also change the Alert Status to one of the following: New information, Call needs to be made, Return call expected, Form to be resent, Return form expected, or Closed.
10. **Buttons:**
 - a. Click the **Save** button to save the change to the Alert Status.
 - b. Click the **Cancel** button to cancel the update action without saving.
11. Click the check box in the **Cancel Alerts** column, then click the Save button to cancel an alert and remove it from the alerts grid.
12. Click an Accession Number link to navigate to the Case Summary screen. The screen will navigate to the old case summary screen for Pre PE II cases, and the new Case Summary screen for Post PEII cases.

View All Users

Utilities >> View All Users

The **View All Users** screen is used to manage existing user account information and group membership.

Note: to create a new user in SIS, use the Entity Relation screen.

FIGURE 1

GDB-SIS

Utilities >> View All Users

Search For:

Sign In ID:

First Name:

Last Name:

Role:

Status:

Group: ☐

Confirmatory Lab - Administrator

Coordinator Center - PNS - Administrator

Follow - up Center - Metabolic Center - Administrator

Follow - up Center - SCCC - Staff

Follow - up Center -PDC - Medical Geneticist

Coordinator Center - NBS - Administrator/Supervisor

Coordinator Center - PNS - Staff - Clerical

Follow - up Center - Metabolic Center - Staff

Follow - up Center -PDC - Clinical Geneticist

Follow - up Center -PDC - Consultative Sonologist

Coordinator Center - NBS - Staff - Clerical/Clinical

Coordinator Center - PNS - Staff - Clinical

Follow - up Center - SCCC - Administrator

Follow - up Center -PDC - Genetic Counselor

Follow - up Center -PDC - Early & standard amniocentesis practitioner

1. In order to update a user's account information and group membership, you must first search for an existing user. Enter one or more criteria in the **Search For** fields, then click the **Search** button (see # 3).
2. Displays a list of all Security Groups that exist in SIS. Select one or more **Group** to search for all users belonging to the selected groups.

Note: You must use the Create New User screen to add or delete group membership for a user.

View All Users (continued)

FIGURE 2

4092: :msc
01/18/2003
00:00:00.000

<input type="checkbox"/> Follow - up Center -PDC - Invoice Liaison	<input type="checkbox"/> Follow - up Center -PDC - Appt. Scheduler	<input type="checkbox"/> Follow - Up Center - PDC - Cytogenetic Laboratory
<input type="checkbox"/> Follow - Up Center - PDC - Quarterly Report Contact	<input type="checkbox"/> Follow - up Center -PDC - PDC Director	<input type="checkbox"/> Follow - up Center -PDC - PSR Contact (formerly PDPR Contact)
<input type="checkbox"/> GDL - Administrator	<input type="checkbox"/> GDL - Chemist I	<input type="checkbox"/> GDL - Chemist II
<input type="checkbox"/> GDL - Data Clerk	<input type="checkbox"/> GDL - Lab Assistant	<input type="checkbox"/> GDL - QA Chemist
<input type="checkbox"/> GDL - QA reviewer	<input type="checkbox"/> GDL- QA releaser	<input type="checkbox"/> GDL- Senior Staff
<input type="checkbox"/> GDB IT - Administrator	<input type="checkbox"/> IT - Analyst	<input type="checkbox"/> IT - Staff
<input type="checkbox"/> NAPS Lab - Administrator	<input type="checkbox"/> NAPS Lab - Staff	<input type="checkbox"/> NAPS Lab - Analyst
<input type="checkbox"/> GDB NBS - Administrator	<input type="checkbox"/> GDB NBS - Monitor	<input type="checkbox"/> NBS - Staff
<input type="checkbox"/> NBS - Follow up staff	<input type="checkbox"/> GDB NBS - Staff - form monitor	<input type="checkbox"/> NBS - Staff - LTR Clerk
<input type="checkbox"/> NBS- Registry - MPKU	<input type="checkbox"/> NBS - County Birth Registrar	<input type="checkbox"/> GDB PDES - Administrator
<input type="checkbox"/> PDES - Analyst	<input type="checkbox"/> PDES - Staff	<input type="checkbox"/> PDES - Staff - Extended Survey
<input type="checkbox"/> PDES - Staff - Outcome	<input type="checkbox"/> PDES - Staff - Quarterly Reports	<input type="checkbox"/> PDES - Staff - Registry - CF
<input type="checkbox"/> GDB PDES - Staff - Registry - Chromosome	<input type="checkbox"/> PDES - Staff - Registry - Endocrine	<input type="checkbox"/> PDES - Staff - Registry - Galactosemia
<input type="checkbox"/> PDES - Staff - Registry - Hemoglobin	<input type="checkbox"/> PDES - Staff - Registry - MS/MS	<input type="checkbox"/> GDB PDES - Staff - Registry - NTD
<input type="checkbox"/> PDES - Staff - Registry - PKU	<input type="checkbox"/> PDES - Staff - RH Disease	<input type="checkbox"/> GDB OSS - Entity - Administrator
<input type="checkbox"/> OSS - Entity - User	<input type="checkbox"/> OSS - AR	<input type="checkbox"/> GDB PNS - Administrator/Monitor
<input type="checkbox"/> PNS - Staff	<input type="checkbox"/> PNS - Staff - LTR Clerk	<input type="checkbox"/> GDB QA - Administrator
<input type="checkbox"/> QA - Adverse Outcomes	<input type="checkbox"/> GDB QA - Cytogenetic Monitor	<input type="checkbox"/> QA - Entity
<input type="checkbox"/> GDB QA - Monitor	<input type="checkbox"/> QA - Staff	<input type="checkbox"/> GDB SuperUser
<input type="checkbox"/> PDES - Staff - Clinical Review - MS/MS		

3

Search Results:

- Click the Search button to search for an existing user based on the search criteria you have entered.

View All Users (continued)

FIGURE 3

The screenshot displays the 'View All Users' interface. On the left is a blue sidebar with the text '4092::msc 01/18/2003 00:00:00.000'. The main area is titled 'Search Results:'. Below this is a table with the following columns: 'Sign In ID', 'First Name', 'Last Name', 'Group', and 'Role Status'. The first row of data is circled with a '4' and contains: 'QAAdmin', 'QAAdmin', 'GroupSixtySix', 'GDB QA - Administrator,QA - Adverse Outcomes,GDB QA - Cytogenetic Monitor,QA - Entity,GDB QA - Monitor,QA - Staff', and 'PDS Active'. Below the table is a large empty rectangular box, circled with a '5'. At the bottom of the interface is an 'Update' button, circled with a '6'.

Sign In ID	First Name	Last Name	Group	Role Status
QAAdmin	QAAdmin	GroupSixtySix	GDB QA - Administrator,QA - Adverse Outcomes,GDB QA - Cytogenetic Monitor,QA - Entity,GDB QA - Monitor,QA - Staff	PDS Active

4. **Search Results** grid displays all user groups matching the search criteria you have entered.
5. If the search returns more than one page of results you can navigate to the additional results pages by clicking the **Page Number** link below the Search Results grid.
6. Click the radio button next to the account Sign In ID and then click the **Update** button to edit the user account.

View All Users (continued)

FIGURE 4

4092: msc
01/18/2003
00:00:00.000

Search Results: **7**

Sign In ID	First Name	Last Name	Group	Role	Status
<input type="radio"/> CCCNorth	CCCNorth	CCCNorth	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
<input type="radio"/> CCCOTH	CCCOTH	CCCOTH	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
<input type="radio"/> CCCSacramento	CCCSacramento	CCCSacramento	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
<input type="radio"/> CCCUserOne	CCCUserOne	A	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
<input type="radio"/> CCCUserSeven	CCCUserSeven	G	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
<input type="radio"/> CoordCenNBSAdmin	CoordCenNBSAdmin	GrouopTwo	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
<input type="radio"/> CoordCenNBSAdminTwo	CoordCenNBSAdminTwo	ForTest	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active

1

7. The View All Users screen is also displayed when the user selects a security group in the View Security Groups screen and clicks the Show Users button. In this case all of the users who belong to the selected security group are displayed in the Search Results section of the View All Users screen.

View CFF File Records

Data Intake >> View CFF File Records

This screen displays the details of the records transmitted in the Cystic Fibrosis Foundation files that are uploaded into SIS from the Upload CFF File screen.

FIGURE 1

GDB-SIS

Data Intake >> View CFF File Records

Client Name: SAILU BATTULA Date of Birth: 4/4/2006
 Accession Number: 097-70-203/21-2006-31
 Patient ID: 245455

Select	Data Year	Primary Center	Date
<input checked="" type="radio"/>	2001	6	04/15/2007

1. Displays client and case information in read-only format.
1. Lists all of the CFF file records received for the client in the grid. Use the **Select** radio button to indicate the specific CFF file data to be displayed.
3. **Buttons:**
 - a. **View:** Displays the CFF file record selected in the grid in read-only mode.
 - b. **Delete:** Deletes and removes the record that is selected in the grid. This function is primarily used so that records can be reloaded from the CFF file if they are incorrect.

View CFF File Records (continued)

FIGURE 2

Add Test Results Audit Data Entry Expected Recall (NBS) View List of CCR Case Resolution MPKU Registry Search Metabolic Service Report Reassign MC Cystic Fibrosis Service Report Reassign CF MS/MS Ref Lab Exptd View Holding Tank Records Expected Phe Monitoring Enter Other Mutation Test Results MC Annual Patient Summary CFC Annual Patient Summary View CFF File Records Biotinidase Expected List	CFF File Upload Details	
	Data Year:	2001
	Primary Center:	6
	Number of outpatients visits:	3
	Total Office Visits - All Centers:	5
	Number of hospitalizations:	4
	Total days in hospital (all stays):	13
	Clinical measurement date:	11/1/2006
	Age at clinical measurement:	24.21
	Height:	156
	Weight:	44
	FVC Value:	1.65
	Total # of FVC Measurements:	2
	Last FVC Measure:	1.65
	FEV1 Value:	1.2
	Total # of FEV1 Measurements:	2
	Last FEV1 Measure:	1.2
	Number of home IV events:	2
	Total days on home IV:	20
	Med: Pulmozyme	0
	Med: Ursodeoxycholic acid	0
	Med: Tobramycin	0
	Med: Other aminoglycoside	0
	Med: Colistin	0
	Med: Macrolides	0
	Med: Chronic oral antibiotic	0
	Med: High-dose ibuprofen	0
	Med: Hypertonic Saline	0
	Med: Bronchodilators/Oral-beta	0
	Med: Bronchodilators/Oral-theophylline	0
	Med: Bronchodilators/Inhale-beta/short	0
	Med: Bronchodilators/Inhale-beta/long	0
	Med: Bronchodilators/Inhale-anticholinergic/short	0
	Med: Bronchodilators/Inhale-anticholinergic/long	0
	Med: Bronchodilators/Inhale-combination	0
	Med: Corticosteroids - Oral	0
	Med: Corticosteroids - Inhaled	0
	Med: Antifungals	0
	Med: Trimethoprim	0
	Med: Ciproflaxin	0
	Med: Cephalosporin	0
	Med: Acetylcysteine/mucomist	0
	Culture: No growth	0
	Culture: Normal flora	0
	Culture: Pseudo. aeruginosa	0
	Culture: Pseudo a / Mucoid	0
	Culture: Pseudo a / Non-Mucoid	0
	Culture: Pseudo a / Unknown	0
	Culture: Burkholderia cepacia	0
	Culture: Stenotrophomonas	0
	Culture: Other Pseudo. species	0
	Culture: Staph. aureus	0
	Culture: MRSA	0
	Culture: Haemophilus influen.	0
	Culture: Aspergillus	0
	Culture: Non-tuberc. mycobact.	0
	Culture: E. Coli	0
	Culture: Klebsiella	0
	Culture: Other Gram Negative	0
	Culture: Alcaligenes	0
	Culture: Other Culture	0
	Complication: ABPA	0
	Complication: DIOS	0
	Take pancreatic enzyme supplements?	0
	Mid-arm circumference	1.7
	Triceps skinfold thickness	89.4
	Sub-scapular skinfold thickness	400.5
	Received lung/heart/liver transplant	0
	Seen at this Care Center in Data Year	1
	Not Seen This Year, but Still Active	0
	Transferred to Another Center	0
	msc::001	
	03/09/2007	
	15:08:D1.130	

4. Displays the details of the CFF file record that was selected from the grid.

View Client Profile

Data Intake >> View Client Profile

The **View Client Profile** screen displays the client profile summary for a given client. The summary includes the current client information, name history, contact information history, address history, case history, extended screening surveys, and any scanned documents associated with the client.

Please note that when updating information from the Client Profile screen, the information will NOT be reflected on the Case Summary screen. If information is updated on the Update Case screen, it will appear on the Client Profile screen.

FIGURE 1

GDB-SIS

Data Intake >> View Client Profile

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Addl Test Results
Case Resolution	NBS NO	NBS MR	NBS OH	NBS TR

Client Information

Client Id: 34032044
 Last Name: PACHECO
 First Name: BABY GIRL
 Middle Initial:
 Maiden Name:
 Date of Birth: 07/28/2006
 Patient Died: Yes
 Date of Death: 02/14/2007
 Social Security Number:
 Race/Ethnicity: Hispanic
 Other Race:
 Gender: Female
 Is the Person English Speaking:
 Primary Language:
 If not Spanish then Primary Language:
 Use Specimen: Yes
 Disclose Patient Information: Yes
 Contact the patient: Yes
 Number of Cases Archived: 0

1. This section displays current information about the client from the TRF.
2. Buttons:
 - a. **Update:** Navigates to the Client Profile screen where changes can be made to the client information (See Figure 3).
 - b. **Back:** Returns to the previous screen.

View Client Profile (continued)

FIGURE 2

Expected Phenylalanine Monitoring
 Enter Other Mutation Test Results
 C Annual Patient Summary
 FC Annual Patient Summary
 View CFF File Records
 Phenylalanine Expected Test

3

Name History

Last Name	First Name	Name Type	Middle Initial	Start Date	End Date
PACHECO	BABY GIRL	Primary		07/31/2006	

4

Contact Information History

Telephone	Type	Start Date	End Date
(818) 834 2045	HOME	07/31/2006	

5

Address History

Address (Number, Street)	Address (Apt, Suite#)	City	State	Zip	Start Date	End Date
10562 Haddon Ave		Pacoima	CA	91331-2916	07/31/2006	

6

Case History

Accession Number	Draw Date	Provider	Interpretation Result
212-73-003/21-2006-31	07/30/2006	LIM, RENEE	

7

Extended Screening Survey

Study Name	Date	Accession no
------------	------	--------------

8

Scanned Documents list

Document Identifier	Document Type	Scanned Date
---------------------	---------------	--------------

SC:001
 8/23/2007
 9:09:39.107

3. The **Name History** grid displays a history of names the client has used in the past, along with the Start Date and End Date of each.
4. The client's previous telephone numbers are displayed in the **Contact Information History** grid along with the Start Date and End Date of each.
5. The client's previous addresses are displayed in the **Address History** grid, along with the Start Date and End Date of each.
6. The client's linked Accession Numbers are displayed in the **Case History** grid, along with the associated Draw Date, Provider, and interpretation Result. Clicking the Accession Number takes you to the Case Summary screen. All the accession numbers belonging to the same case are displayed.
7. The **Extended Screening Survey** grid displays the Study Name, Date, and Accession Number.
8. The **Scanned Documents List** provides a list of documents associated with the client that have been scanned into the system, and will allow you to access the image for each.

View Client Profile (continued)

FIGURE 3

Client/Case Search
 Id Search
View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 TRF Data Entry (NBS)
 Case Summary (NBS)
 Lab CoFC
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Addl Test Results
 Audit Data Entry
 Expected Recall (NBS)
 View List of CCR
 Case Resolution
 MPKU Registry Search
 Metabolic Service
 Report
 Reassign MC
 Cystic Fibrosis Service
 Report
 Reassign CF
 MS/MS Ref Lab Expctd
 View Holding Tank
 Records
 Expected Phe
 Monitoring
 Enter Other Mutation
 Test Results
 MC Annual Patient
 Summary
 CFC Annual Patient
 Summary
 View CFF File Records
 Biotinidase Expected
 List
 msc::001
 03/23/2007

Data Intake » View Client Profile » Client Profile

Specimen History	Case Summary (PNS)	Case Summary (NBS)	Update Address	Update Phone Nbrs
Update Name	Maint Client Relation	Resolve Duplicates	View Edit Log	Addl Test Results
Case Resolution	NBS ND	NBS MR	NBS OH	NBS TR

Client Name: PACHECO, BABY GIRL Date of Birth: 7/28/2006

*Last Name: PACHECO
 First Name: BABY GIRL
 Middle Initial:
 Maiden Name:
 Date of Birth: 07 - 28 - 2006
 Patient Died: ☒
 Date of Death: 02 - 14 - 2007
 Social Security Number:
 Race / Ethnicity:

☐ White ☒ Hispanic ☐ Black
☐ Chinese ☐ Japanese ☐ Korean
☐ Cambodian ☐ Laos ☐ Vietnamese
☐ Filipino ☐ Other Southeast Asian ☐ Native American
☐ Middle Eastern ☐ Asian East Indian ☐ Hawaiian
☐ Guamanian ☐ Samoan ☐ Unknown
☐ Other

*Gender: Female
 Is the Person English Speaking: Select
 Use specimen: ☒
 Disclose Patient Information: ☒
 Contact the patient: ☒

Save Back

9. Enter or update the name, date of birth, date of death and social security number for the client.
10. **Race/Ethnicity:** Select the appropriate ethnicity information in the checkboxes. The race/ethnicity section will accept multiple checkmarks.
11. Select the **Gender** from the dropdown box.
12. **Buttons:**
 - a. **Save:** Saves all changes.
 - b. **Back:** Returns to previous screen without saving.

Note: The Use Specimen, Disclose Patient Information and Contact the Patient checkboxes should only be updated

View Edit Log

Data Intake >> Client Case/Search >> View Edit Log

This screen is used to search for and view the record of changes (edit log) made to a Pre PE II Case. Based on the accession number the application loads the Pre or Post PE II screen for the case.

FIGURE 1

Data Intake >> View Client Profile >> View Edit Log

Client Name: NGUYEN, MEENA Date of Birth: 4/7/1962

Accession Number: 041-11-133/P -2003-12

Start Date: 01-01-2003

End Date: 01-18-2003

Change Type: All

Field:

Search Clear

Date	Change Type	Field	Original Value	Changed Value	Changed By
01/17/2003	T_CASE_PSR	Date of Submission		1/17/2003 12:00:00 AM	San Diego, PDC User

1. **Client Information** is displayed in read only format.
2. **Search Criteria:**
 - a. **Accession Number** – Unique number associated with the client specimen.
 - b. **Start Date** – enables to specify start date for a specific time period to search.
 - c. **End Date** – enables to specify end date for a specific time period to search.
 - d. **Change Type** – enables to specify the change type like master data etc.,
 - e. **Field** – enables to specify the field under the change type.
3. **Buttons:**
 - a. **Search** – Search for edit log records based upon entered search criteria.
 - b. **Clear** – Clears the information from all fields, and reloads a blank screen
4. **Edit Logs** based on the search criteria are displayed in a read only format. The information includes Trimester, Accession Number, Date, Change Type, Field, Original Value, Changed Value, changed By

View Edit Log (continued)

This screen is used to search for and view the record of changes (edit log) made to a Post PE Case. Based on the accession number the application loads the Pre or Post PE II screen for the case.

Accn=223-39-096/P -2008-63 Name=ABCTDZAVALETAABCTD, ABCTDGREGORIAABCTD DOB=1/15/1960 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Data Intake » View Edit Log

Client Name: ABCTDZAVALETAABCTD, ABCTDGREGORIAABCTD Date of Birth: 1/15/1960

Valid Specimens (used for Risk Assessment)

Trimester	Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
1st Trimester	180-87-466/A -2008-11	06/25/2008	1st T Combined: Screen Positive for T21, T18	PDC referral to site (04a)

Associated Specimens

Accession Number	BCD	Risk Assessment Interpretation	Tracking Status
223-39-096/P -2008-63	08/02/2008	2nd T: Partial Panel -- Optional Redraw	Ask Clinician About Redraw

Start Date: End Date: Change Type: All Field:

Search Clear

Trimester	Accession No	Date	Change Type	Field	Original Value	Changed Value	Changed By
		08/12/2008 00:00:00	NT Details	NT_PRACTITIONER_CRDNTL_CODE		P01003	SYSTEM
		08/12/2008 00:00:00	NT Details	NT_EXAM_DT		07/12/2008 00:00:00	SYSTEM
		08/12/2008 00:00:00	NT Details	TWIN_FLAG		0	SYSTEM

Session time remaining :00:59:44 seconds. Local intranet

1. **Client Information** is displayed in read only format.
2. The information about the **Valid Specimens used for Risk Assessment** is displayed in a read only format. The information includes Trimester, Accession Number, BCD, Risk Assessment Interpretation and Tracking Status.
3. The information about the **Associated Specimens used** is displayed in a read only format. The information includes Accession Number, TRF Number, BCD, Risk Assessment Interpretation and Tracking Status.
4. **Search Criteria:**
 - a. **Accession Number** – Unique number associated with the client specimen.
 - b. **Start Date** – enables to specify start date for a specific time period to search.

View Edit Log (continued)

- c. **End Date** – enables to specify end date for a specific time period to search.
 - d. **Change Type** – enables to specify the change type like master data etc.,
 - e. **Field** – enables to specify the field under the change type.
5. **Buttons:**
- a. **Search** – Search for edit log records based upon entered search criteria.
 - b. **Clear** – Clears the information from all fields, and reloads a blank screen
6. **Edit Logs** based on the search criteria are displayed in a read only format. The information includes Trimester, Accession Number, Date, Change Type, Field, Original Value, Changed Value, Changed By.

View Holding Tank Records

Data Intake » View Holding Tank Records

The **View Holding Tank Records** screen is used to Holding Tank records between a given time period having a start date and an end date with a selected Program Area. The lab code and the Sort By fields are optional to narrow the search criteria.

Data Intake » View Holding Tank Records

* Start date: 11 - 01 - 2007

* End Date: 12 - 12 - 2008

* Program Area: PNS

Lab Code: Select

Sort By: Select

Search Cancel

Search Results

Accession Number	Form Number	Status
305-75-616/P -2007-32	000000000L	Unknown
306-40-118/P -2007-12	000000000L	Unknown
309-61-028/P -2007-11	000000000L	Unknown
311-79-078/P -2007-31	000000000L	Unknown
312-43-038/P -2007-12	000000000L	Unknown
313-53-041/P -2007-32	000000000L	Unknown
313-91-042/P -2007-32	000000000L	Unknown
313-30-043/P -2007-32	000000000L	Unknown
313-68-044/P -2007-32	000000000L	Unknown
313-07-045/P -2007-32	000000000L	Unknown
313-45-046/P -2007-32	000000000L	Unknown
313-83-047/P -2007-32	000000000L	Unknown
313-22-048/P -2007-32	000000000L	Unknown
313-60-049/P -2007-32	000000000L	Unknown
313-41-050/P -2007-32	000000000L	Unknown
313-79-051/P -2007-32	000000000L	Unknown
313-18-052/P -2007-32	000000000L	Unknown
313-56-053/P -2007-32	000000000L	Unknown
313-74-054/P -2007-32	000000000L	Unknown

1. Search Criteria to be provided. Start Date, End date and Program area are to be provided mandatorily. Lab Code and Sort By are used to further narrow the Search.
2. **Buttons:**
 - d. Click the **Search button** to search using the provided search criteria.
 - e. Click the **Cancel** button to reset the search criteria.
3. **Search Results** grid. Displays the Accession number, Form number and Status in read-only format.

View List of CCRs (Confidential Case Reports)

Data Intake >> View List of CCR

This screen allows you to view a list of CCR and Consolidated Registry for a client, and add a new CCR, edit CCR, edit consolidate source in SIS. This screen also provides a link the CCR screen and consolidate screen, where you can view and enter CCR and consolidate data.

FIGURE 1

Data Intake >> View List of CCR

Client Name: ROSY, WILLIAMS Date of Birth: 8/8/1979
 Accession Number: 112-74-215/P -2007-21
 113-74-233/A -2007-21

CCR List:

Accn. No.	Source	Date	Pregnancy Id	Fetus Code	Infant Id	Data Entry Src	Link
113-74-233/A -2007-21	PDC	06/21/2007	1	A		SCREEN	CONSOLIDATE
113-74-233/A -2007-21	PDC	06/21/2007	1	A		SCREEN	
200-77-111/P -2007-21							

Consolidated Registry List:

Accn. No.	Registry Id	Date	Pregnancy Id	Fetus Code	Infant Id	Registry Status
113-74-233/A -2007-21	200126007	10/01/2007	1	A		Probable
113-74-233/A -2007-21	200126009	10/01/2007	1	A		Certain
200-77-111/P -2007-21						

Scanned CCR Forms:

Document Identifier	Document Type	Scanned Date
Add		

mac: 001
 06/21/2007
 09:55:39.110

1. The client's basic information is displayed in a read-only format based for the case.
2. **CCR List** grid displays the CCR sources, the date the CCRs were completed, **pregnancy Id**, **Fetus Code**, **Infant Id**, **Data Entry Src** and **Link** based on the information entered in the fields above. If the case has two valid Accn Numbers (1st and 2nd trimester) those will be displays as one row in the CCR grid
 - a. **Accn No** – Clicking an Accession Number link will navigate to the old Case Summary (PNS) screen for Pre PEII Cases and will navigate to the new Case Summary (PNS) screen for Post PEII Cases. If the case has two valid Accn numbers those will be displayed as one row.
 - b. **Date** – when clicking on the date values (hyperlinks) you will navigate to the **CCR** screen, which allows you to view and edit the existing CCR

View List of CCRs (Confidential Case Reports) (continued)

information. If a CCR has not yet been entered, the **CCR** screen allows you to enter data for a new CCR.

While multiple sources can be added to the View List of CCR screen, there is only one screen for CCR data. If there is more than one CCR source available, you must make independent choices regarding which data to enter. In effect, you will pre-consolidate the CCR sources, prior to registry consolidation. The List of CCRs serves to document the various sources used for the pre-consolidated CCR.

- c. **Link** – directs you to the Consolidated Registry screen, which allows you to view and edit the existing Consolidated Registry information.

Data Intake >> View List of CCR

Client Name: ROSY, WILLIAMS Date of Birth: 8/8/1979
 Accession Number: 112-74-215/P -2007-21
 113-74-233/A -2007-21

CCR List:

Accn. No.	Source	Date	Pregnancy Id	Fetus Code	Infant Id	Data Entry Src	Link
113-74-233/A -2007-21	PDC	06/21/2007	1	A		SCREEN	CONSOLIDATE
113-74-233/A -2007-21	PDC	06/21/2007	1	A		SCREEN	
200-77-111/P -2007-21							

Consolidated Registry List:

Accn. No.	Registry Id	Date	Pregnancy Id	Fetus Code	Infant Id	Registry Status
113-74-233/A -2007-21	200126007	10/01/2007	1	A		Probable
113-74-233/A -2007-21	200126009	10/01/2007	1	A		Certain
200-77-111/P -2007-21						

Scanned CCR Forms:

Document Identifier	Document Type	Scanned Date
<input type="button" value="Add"/>		

msc: 001
 06/21/2007
 09:55:39.110

3. Consolidated Registry grid displays the Consolidated Registry sources, the date the Consolidated Registry were completed, **pregnancy Id, Fetus Code, Infant Id, Registry Status** based on the information saved at the time of creating consolidated registry.

If the case has two valid Accn Numbers (1st and 2nd trimester) those will be displays in the one row in the CCR grid

View List of CCRs (Confidential Case Reports) (continued)

- a. **Accn No** – Clicking an Accession Number link will navigate to the old Case Summary (PNS) screen for Pre PEI Cases and will navigate to the new Case Summary (PNS) screen for Post PEI Cases. If the case has two valid Accn Numbers those will be displayed in the one row.
 - b. **Date** – clicking into the hyperlink will direct you to the Consolidated Registry screen, which allows you to view and edit the existing Consolidated Registry information.
4. This grid displays the **Document Identifier**, **Document Type** and the **Scanned Date** of the scanned CCR forms associated with the client and the case.
 5. **Add** button allows you to identify a new CCR source for the case.

FIGURE 2

GDB-SIS

Data Intake Entity Monitor Follow Up Center CCC Utilities

Client/Case Search
 Id Search
 View Client Profile
 Specimen History
 TRF Data Entry (PNS)
 Case Summary (PNS)
 TRF Data Entry (NBS)
 Case Summary (NBS)
 Lab Coft
 View Edit Log
 Resolve Duplicates
 Maint Client Relation
 Upload CCR
 Add Test Results
 Audit Data Entry
 Bistimase Expected List
 Expected Recall (NBS)
 View List of CCR
 Case Resolution
 MPKII Registry Search
 Metabolic Service Report
 Cystic Fibrosis Service Report
 Reassign CF
 Reassign MC
 Enter Other Mutation
 Test Results
 MS/MS Ref Lab Expectd
 View Holding Tank Records
 MC Annual Patient Summary
 Expected Phe Monitoring
 CFC Annual Patient Summary
 View CFF File Records

Data Intake >> View List of CCR

Client Name: ROSY, WILLIAMS Date of Birth: 8/8/1979
 Accession Number: 112-74-215/P -2007-21
 113-74-233/A -2007-21

CCR List:

Accn. No.	Source	Date	Pregnancy Id	Fetus Code	Infant Id	Data Entry Src	Link
113-74-233/A -2007-21	PDC	06/21/2007	1	A		SCREEN	CONSOLIDATE
113-74-233/A -2007-21	PDC	06/21/2007	1	A		SCREEN	
200-77-111/P -2007-21							

Consolidated Registry List:

Accn. No.	Registry Id	Date	Pregnancy Id	Fetus Code	Infant Id	Registry Status
113-74-233/A -2007-21	200126007	10/01/2007	1	A		Probable
113-74-233/A -2007-21	200126009	10/01/2007	1	A		Certain
200-77-111/P -2007-21						

Scanned CCR Forms:

Document Identifier	Document Type	Scanned Date
Add		

msc:001
 06/21/2007
 09:55:39.110

6. **View Consolidated CCR** link directs you to the **CCR** screen, which allows you to view and edit the existing CCR information. If a CCR has not yet been entered, the **CCR** screen allows you to enter data for a new CCR.
 - While multiple sources can be added to the View List of CCR screen, there is only one screen for CCR data. If there is more than one CCR source available, you must make independent choices regarding which data to enter. In effect, you will pre-consolidate the CCR sources, prior to registry consolidation. The List of CCRs serves to document the various sources used for the pre-consolidated CCR.

View MC Reference Lab Expected List

Data Intake >> MS/MS Ref Lab Expctd

This screen will list out all cases with a pending positive MS/MS disorder pattern.

FIGURE 1

View MC Reference Lab Expected List

Accession Number	Last Name, First Name	Date of Collection	Gender	Date of Birth	Interpretation	Metabolic Center	Positive Disorder Pattern
095-15-910/21-2006-71	SMITH, ROSE	04/04/2006	Female	04/01/2006	Acylcarnitine: Positive, Amino acid: Negative		MCADD
095-34-909/21-2006-71	SMITH, LILY	04/04/2006	Female	04/01/2006	Acylcarnitine: Positive, Amino acid: Negative		MCD,PA/MMA
094-09-174/21-2006-22	SHARMA, JON	04/02/2006	Male	03/31/2006	Acylcarnitine: Negative, Amino acid: Positive	UCSD METABOLIC CENTER	Maple Syrup Urine Disease
095-95-908/21-2006-71	CHANG, RIA	04/01/2006	Female	04/01/2006	Acylcarnitine: Positive, Amino acid: Negative		SCADD, IBADD
095-77-907/21-2006-31	DANG, URMI	04/04/2006	Female	04/01/2006	Acylcarnitine: Positive, Amino acid: Negative		GA-I
095-35-910/21-2006-31	WILLS, BET	04/04/2006	Female	04/01/2006	Acylcarnitine: Positive, Amino acid: Negative		MCADD
060-55-179/21-2006-31	BOY, MARK	02/27/2006	Male	02/26/2006	Acylcarnitine: Positive, Amino acid: Negative	CEDARS SINAI MEDICAL CENTER	Carnitine Transporter Deficiency
100-81-018/21-2006-11	BABY, ANNE	04/07/2006	Female	04/06/2006	Acylcarnitine: Positive, Amino acid: Negative	UC DAVIS MEDICAL CENTER	GA-I

1 2 3 4 5

1. This is a read-only screen except for the link on the **Accession Number** field. Click on the **Accession Number** link to go to the Confirmatory Test Results screen for a particular case.
2. All cases shown on this list will remain until the case has been resolved on the case resolution screen.

View MSMS Review Cases

CCC >> View MSMS Review Cases

This screen displays all cases with an interpretation of “review”. This screen is used by case coordinators to view cases that cannot be determined by the interpretation algorithm.

CCC >> View MSMS Review Cases

Select	Date Assigned	Twin	Sex	Date Of Birth	Accession Number	Disorder Patterns	Overall Interpretation	Age at Collection (hours)	Birth Weight (grams)	Feeding Type	ALERT	View CCC Code
<input checked="" type="radio"/>	07/17/2004		Male	07/08/2004	195-03-260/21-2004-11		Review	2	3751	FOO	!	100

Update

4092::msc
07/24/2004
00:00:00.000

1. Records with an Overall Interpretation of Review are displayed in the data grid. Select a record by clicking the radio button in the select column.
2. **Buttons:**
 - a. **Update** – update the record selected in the data grid. This will display the Update MS/MS Review Cases screen.

View Reference Tables

Utilities >> View Ref Tables

This screen displays the reference tables used in the SIS application. Values in these tables may be updated using the Maintain Reference Table screen.

Change Password
View All Users
Batch Run Time Rept
Assign CCC/Lab
Maint Time Parameter
View Ref Tables
Search for Mailers
View Security Groups
Maint Business Rules
Maint Profic Test

3589::msc
01/25/2005
19:52:52.827

Utilities >> View Ref Tables

Maint Reference Tbl

Utilities - View Reference Tables

168 Reference Table(s) Returned

	Reference Table	Comment	Editable
<input type="radio"/>	T_LKUP_ABN		Yes
<input type="radio"/>	T_LKUP_ACTN_TYPE		Yes
<input type="radio"/>	T_LKUP_ADDITIONAL_DX		Yes
<input type="radio"/>	T_LKUP_ADT_STUS		Yes
<input type="radio"/>	T_LKUP_AF_ACHE		Yes
<input type="radio"/>	T_LKUP_AF_AFP		Yes
<input type="radio"/>	T_LKUP_ALRT_FLTR		Yes
<input type="radio"/>	T_LKUP_ALRT_STUS		Yes
<input type="radio"/>	T_LKUP_APPT_STUS		Yes
<input type="radio"/>	T_LKUP_APRVL_STUS		Yes
<input type="radio"/>	T_LKUP_ASCMT_CODE		Yes
<input type="radio"/>	T_LKUP_BATCH		Yes
<input type="radio"/>	T_LKUP_BEFORE_12_HRS_RSN		Yes
<input type="radio"/>	T_LKUP_CASE_CCC_STUS		Yes

1 2 3 4

View

1. The grid contains rows listing each reference table and indicates if it is editable.
2. Select a record in the data grid table by clicking the radio button next to it and click the **View** button to navigate to the Maintain Reference Table screen.

View Security Groups

Utilities >> View Security Groups

The **View Security Groups** screen is used to view, create new and edit existing SIS security groups, and to manage security permissions that each group has for each screen.

Security Groups

Group ID	Group Name	Group Description
1	Confirmatory Lab - Administrator	Confirmatory Lab - Administrator
2	Coordinator Center - NBS - Administrator/Supervisor	Coordinator Center - NBS - Administrator/Supervisor
3	Coordinator Center - NBS - Staff - Clerical/Clinical	Coordinator Center - NBS - Staff - Clerical/Clinical
4	Coordinator Center - PNS - Administrator	Coordinator Center - PNS - Administrator
5	Coordinator Center - PNS - Staff - Clerical	Coordinator Center - PNS - Staff - Clerical
6	Coordinator Center - PNS - Staff - Clinical	Coordinator Center - PNS - Staff - Clinical
7	Follow - up Center - Metabolic Center - Administrator	Follow - up Center - Metabolic Center - Administrator
8	Follow - up Center - Metabolic Center - Staff	Follow - up Center - Metabolic Center - Staff

New Update Show Users Show Access

4092::msc
01/18/2003
00:00:00.000

1. The **Security Groups** grid displays all of the existing SIS security groups. Click the radio button next to a security group to select it for editing.
2. **Buttons:**
 - a. Click the **New** button to go to the Security Groups screen, and create a new security group.
 - b. Click the **Update** button with a security group selected to go to the Security Groups screen, and update the profile for the selected security group.
 - c. Click the **Show Users** button with a security group selected to go to the View All Users screen, and display all users who belong to the selected security group.
 - d. Click the **Show Access** button to go to the Page Security screen, and display the permission that the selected security group has for each screen.

View Special Service Authorization

Follow Up Center >> View Special Auth

The View Special Authorizations screen will allow you to view follow-up service(s) authorized or denied information for a client at a specific PDC. You may search on the accession number, or on PDC Code or you may search over a range of dates for all of the special payment authorizations that occurred over that range.

Follow Up Center >> View Special Auth

Accession Number: 269-70-121/P-2007-31

PDC Code: 03a

PDC Name: Prenatal Diagnosis of Northern

Date From: 07-19-2008

Date To: 07-19-2008

Go Clear

Accession Number	Last Name	Referral	Requested Service Date	Status	Approved By	Requestor Name
269-70-121/P-2007-31	GARCIA	2nd Trimester	07-19-2008	PUBS	Deny	SIS, A

msc::001
08/15/2008
00:00:00.000

1. The Screen name and navigation is displayed. The Module Tab for the screen will be highlighted.
2. You can do a search based on Accession Number. The search will bring up the Special Authorizations or Denials for all the specimens associated with the Case with which the Accession Number is associated.
3. PDC users will have access to the View Special Authorization screen, however they only have access for their own PDC (and satellites, if applicable). The PDC Code field will be pre-populated for PDC users. Other users like GDB Monitor, CCC etc. can enter any PDC code as the search criteria.
4. You can enter a **Date From** and **Date To** range. This range must not exceed 12-months.
5. **Buttons:**
 - e. **Go** – displays all special authorizations for a PDC in the special authorizations grid.
 - f. **Clear** – clears all search criteria entered.

View Special Service Authorization (Continued)

6. Special Authorization search results grid displays the follow-up services authorized for a PDC by the GDB, depending on the search criteria. Clicking the accession number directs the user to the Case Summary screen.
7. The Trimester of the accession number is displayed in the Search Results Grid.

4.0 Glossary

1. **1st Level Link** – see Module Tabs
2. **2nd Level Link** – These are the links that appear on the left-hand side of the SIS screen.
3. **3rd Level Link** – These are the links that appear on the top of the SIS screen, just below the module tabs.
4. **Alert** - An alert is an important message to a SIS user. They appear in a number of places in the system, identified by an exclamation (!) point.
5. **Batch Interface** – A batch interface transfers data from one computer system to another at regularly scheduled intervals.
6. **Button** – Buttons are small graphics that trigger some action in SIS (e.g. Save, Cancel, Search).
7. **Checkbox** – A checkbox can be clicked using a mouse pointer, rather than by using the keyboard. Clicking a checkbox can either add a checkmark, or remove an existing checkmark. Checkmarks are used when more than one value might apply, and multiple checkmarks might be filled.
8. **Column Header** – The column header is the top most row of any data grid. The column headers define the types of data in the grid. Clicking on the column header will often sort the records in the grid by that column.
9. **Diaried Event** – A diaried event is a record of an action or change to a case record in SIS. Diaried Events are automatically generated as a result of user actions or automated actions internal to SIS.
10. **Dropdown** – A dropdown is a field that allows you to view a menu of options for filling the field. Clicking this button reveals multiple selections, which “drop down” in a small menu. Clicking one of the data selections results in the field being populated by this data. A dropdown field may only be populated by one of the listed selections. Typically, you will not be able to type data into a dropdown field.
11. **Edit mode** – A screen is in edit mode when the values displayed can be changed. These values may be fields, checkboxes, radio buttons, dropdowns, or other data elements.
12. **Entity** – An entity is any person or organization associated with the Genetic Disease Branch. Examples of entity types include hospitals, clinicians, PDCs, and CCCs. Hospital Codes or Clinician Code are two examples of Entity Codes. A Hospital Name may also be referred to as an Entity Name.
13. **Export** – Saving a set of data from the SIS system in an alternative file format is known as exporting. Typical export file types include Microsoft Excel (*.xls), Adobe Acrobat (*.pdf), and comma-separated value (*.csv).

14. **Field** – A cell (small box) that may or may not contain data, or allow data to be entered. Read-only fields may not be edited.
15. **Grayed out** – Fields, buttons, or values are grayed out when they are visible, but cannot be edited. Typically they are a light grey color, in contrast with the standard black color when they can be edited.
16. **Grid** – The SIS documentation often refers to “grids”. These are tables displayed on a screen in SIS containing various types of data such as patient information, entity information, alerts, etc.
17. **Hyperlink** – A link appears as blue text on the SIS screen. Placing the mouse pointer over the text causes it to become underlined. Clicking on a link allows users to navigate to another screen. A Hyperlink is also known as a link.
18. **Inconsistency** – PSR inconsistencies are errors or omissions in the PSR that are automatically detected by the system. These inconsistencies generate error messages, and must be resolved manually by updating the records, or via GDB overriding the inconsistency.
19. **Link** – Hyperlinks appears as blue text on the SIS screen. Placing the mouse pointer over the text causes it to become underlined. Clicking on a link in SIS allows a user to navigate to another screen. A Link is also known as a Hyperlink.
20. **Linking** – Used to describe: 1) a connection made between two Accession Numbers. For example, if an inadequate specimen were received, the redraw specimen would be automatically “linked” to the initial specimen in SIS. 2) A relationship between a client and an entity. For example, an NBS client may be linked to a hospital.
21. **Matching** – Used to describe the built-in calculation function that will identify two records to be linked or merged.
22. **Merging** – Used to describe two separate clients or entities becoming one in SIS. For example, if a Test Request Form (TRF) contains provider information that SIS does not recognize, that provider will be added to SIS as a “one-time provider.” If a user were able to determine that this “one-time provider” was the same as an existing provider, the user could “merge” the two, making them one record.
23. **Module Tabs** - (1st Level Links) - Modules are groupings of screens that will help specific user groups accomplish their work. Your specific user group will determine what module tabs are available to you. These module tabs are the highest level of navigation available in SIS and sit across the top of the screen.
24. **Navigate (Navigation)** – The action of moving from one place in SIS to another, using links, buttons and tabs.
25. **OCR** – Optical Character Recognition. This technology allows the user to scan paper forms (such as Test Request Forms, NBS Forms, Outcome Surveys, etc.)

that have been filled out manually, and automatically recognize and load the written data into the system.

26. **PNS** –Prenatal Screening. This term will be used to describe the program also known as the Expanded Alphafetoprotein (XAFP) Program.
27. **Populated** – Populated fields are fields that are automatically filled with data values by the system.
28. **Print Dialog box** – The print dialog box is the window that appears when users choose a print action in SIS. The print dialog box allows users to choose the output device, set paper orientation, and perform other printing configuration activities.
29. **PSR** – PSR stands for Patient Services Report. This SIS report will replace the PDPR (Prenatal Diagnosis Program Report), which was used in Data General. PSRs are used to track services provided to patients at Prenatal Diagnosis Centers.
30. **PSR Inconsistency** – PSR inconsistencies are errors or omissions in the PSR that are automatically detected by the system. These inconsistencies generate error messages that appear in bold red text at top of the PSR screen. These inconsistencies must be resolved manually by updating the records or via GDB overriding the inconsistency.
31. **Radio button** – A radio button is similar to a checkbox but often appears in a grid. Only one radio button in a group may be selected at a time (as with a car radio, where only one station can be selected at a time).
32. **Relationship** – A relationship is a link between two entities in SIS. Relationships may be created automatically by the system or manually by the user.
33. **Scroll** – Moving the screen up and down or side-to-side using the bars on the edge of the browser window.
34. **Search Criteria** – Search criteria are the set of values a user enters into a search page, in order to locate a record or set of data. The search engine returns values that correspond to the entered search criteria. More detailed criteria will increase the precision of the returned results.
35. **Security Group** – Collection of users with a given set of permissions, as defined by GDB. These permissions define the access users have to view data and perform actions in SIS. For example, a user at a Case Coordination Center (CCC) will only be able to view patient data for those patients assigned to his/her CCC.
36. **Sort** – Data that appears in a grid may be organized, or sorted in multiple ways. Typically data can be sorted alphabetically or numerically, from lowest to highest, or vice versa. In some cases, SIS allows you to sort based on multiple prioritized criteria. For example, a list of Headline Cases may be sorted first by Accession Number, then by Client Last Name.

37. **Tracking Event** - Tracking events are used to track changes to the status of a case in SIS. This will typically include documentation of actions that have already taken place. For example, "Clinician agreed to PDC referral." or "Physician result letter sent."
38. **Tracking Status** – Identifies the current status of the case, based on the Interpretation or on Tracking Events that have been entered on the case.
39. **Validation** – Automatic evaluation of data that has been entered. For example, SIS will validate any address that has been entered, to ensure it is a "valid" address.
40. **Warning** – A warning is an automatic message pop-up, triggered as a result of a user action in SIS. This warning may be used to identify your next step in SIS (e.g. "You have saved changes to interpretation factors. Do you want to send a mailer or enter tracking events?") In other cases, a warning attempts to help you avoid making a mistake